

Franchising in the Economy 1984-1986



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Franchising in the Economy 1984-1986

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Finance and Management Industries Division

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FOREWORD

The franchise system of distribution is a significant part of the U.S. economy and is viewed as a dynamic, growing business activity, increasingly accepted and respected by the public, all levels of government, and by the business community. Franchising has become a powerful force partly because economic factors have made growth through company-owned units difficult for many businesses. Therefore, by emphasizing independent ownership, franchising provides an effective method of overcoming such problems as shortage of capital, high interest rates, and finding and hiring competent employees.

To follow this rapidly growing industry, the International Trade Administration, U.S. Department of Commerce, conducted its 15th annual survey of franchisors, the only one of its kind in the country. Questionnaires were mailed to all known business format franchisors and individual returns were received from 1,942 franchisors representing an estimated 99 percent of business format franchising sales and establishments in the United States. A complete list of such franchisors is continually being maintained and updated by the International Trade Administration through the use of trade journals, company news releases, trade association data, and registration lists of those States which require mandatory registration of all franchisors.

To supplement the survey, franchising data for automobile and truck dealerships, gasoline service stations, and soft drink bottlers are included from other sources. Data for some franchised business categories are not comparable with survey results published in earlier editions of this publication due to revisions in a number of these categories.

The survey and report were prepared by Andrew Kostecka, Finance and Management Industries Division, Office of Service Industries. Typing was provided by Irene F. Freeman. The Department of Commerce extends its appreciation to all respondents who have contributed to the success of the report over the past several years.

Wray O. Candilis, Director
Finance and Management Industries Division
Office of Service Industries

Survey Results

Franchising sales of goods and services in more than 478,000 outlets are expected to reach \$576 billion in 1986, about 9 percent higher than a year earlier and about 72 percent over the level of sales at the start of the 1980's. Employment in franchising, including part-time workers and working proprietors, was 5.7 million in 1984 and will probably reach more than 6.3 million by the end of 1986. Movement by U.S. franchisors to foreign markets continues to grow at a rapid rate and in 1984 there were 328 U.S. franchisors with over 27,000 outlets located in most countries of the world.

Franchising itself is a word used in some form by everyone: bankers, educators, all types of business persons, and the general public. Although this important word has become a common household term in our society, it is both understood and misunderstood by many. Today, you can hardly buy anything that does not go through franchising in some fashion. Not everyone knows what franchising is, but just about everyone does business with firms in the system.

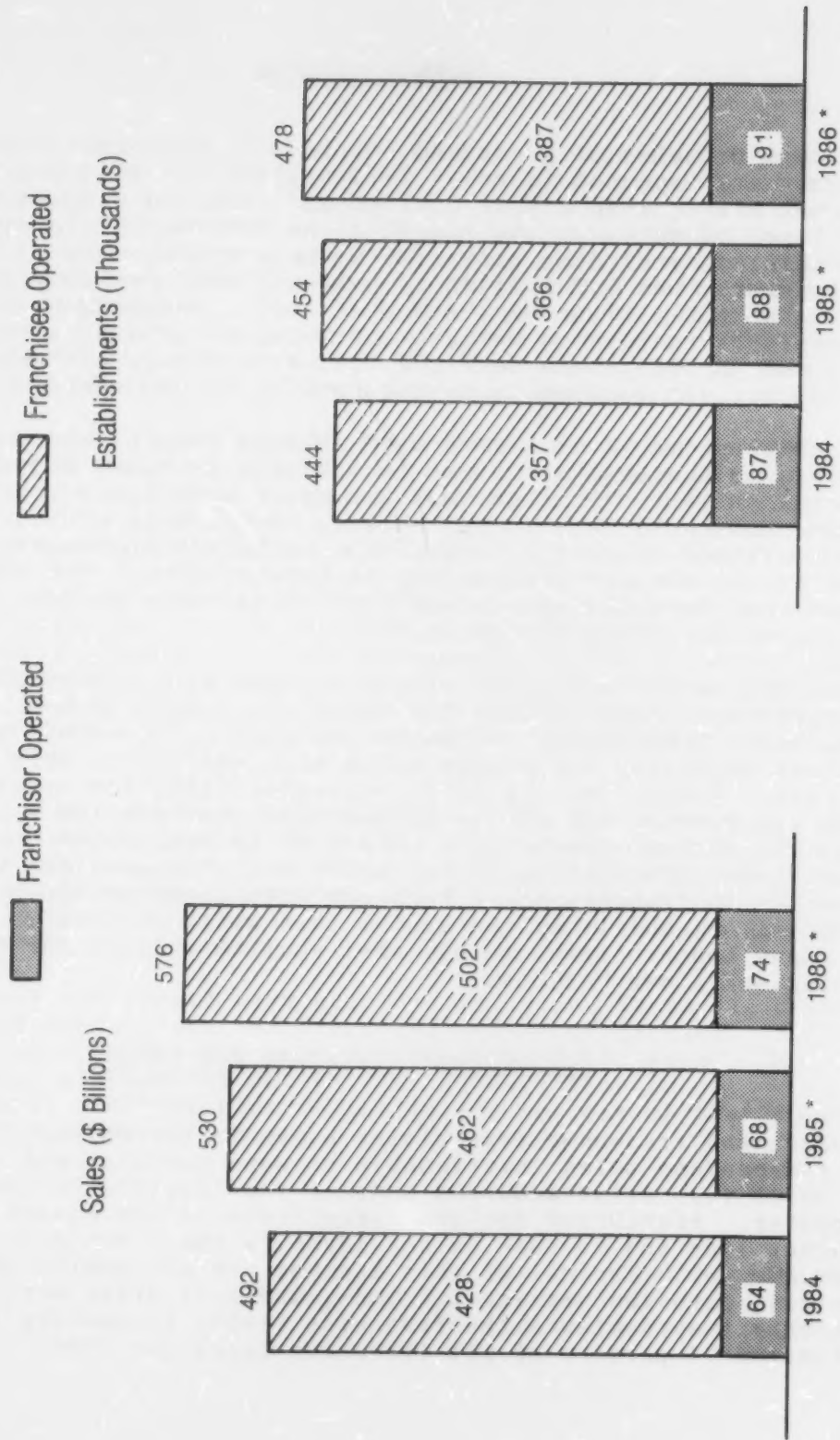
It is the marketing sector of our economy which today offers the greatest opportunities for entry and growth of new business. Franchising is one of the most creative of the various marketing techniques which have emerged in this century. Today, the key to a successful franchise operation is a strong system. It is the system that provides the appearance that all outlets belong to a chain; it is the system that all franchisees can follow; it is the system that provides the know-how to franchisees to keep one step ahead of the competition; and it is the system that will continue to provide abundant opportunities to all that want to fulfill the dream of owning one's own business.

1. Product and Tradename Franchising

Product and tradename franchising began in the United States as an independent sales relationship between supplier and dealer in which the dealer acquired some of the identity of the supplier. Franchised dealers concentrate on one company's product line and to some extent identify their business with that company. Typical of this segment are automobile and truck dealers, gasoline service stations, and soft drink bottlers. Together they dominate the franchise field, accounting for an estimated 74 percent of all franchise sales for 1986.

Chart 1

Total Sales and Establishments



* Estimated by Respondents

Total sales by product and tradename franchisors are expected to reach an estimated \$425 billion in 1986 compared with \$396 billion in 1985 and \$370 billion in 1984. Since 1972, the establishments of product and tradename franchisors declined at a rapid rate; for example, there was a net loss of over 94,000 gasoline service stations between 1972 and 1984 alone. The attrition rate is expected to slow in the next few years and in 1986 the number of these establishments is expected to decline to 149,640--from 153,241 in 1985 and 160,723 in 1984. The number of establishments and gross sales of product and tradename franchisors for 1972-86 are listed below:

	<u>Sales</u> <u>(billions of dollars)</u>	<u>Establishments</u>
1972	115.2	262,100
1973	131.0	251,395
1974	131.3	230,974
1975	144.9	223,724
1976	171.3	220,946
1977	195.9	211,984
1978	217.9	207,896
1979	241.0	199,785
1980	250.8	189,823
1981	275.7	181,863
1982	277.0	174,107
1983	312.3	164,986
1984	369.8	160,723
1985*	395.6	153,241
1986*	424.5	149,640

* Estimated

2. Business Format Franchising

Business format franchising is characterized by an ongoing business relationship between franchisor and franchisee that includes not only the product, service, and trademark, but the entire business format itself--a marketing strategy and plan, operating manuals and standards, quality control, and continuing two-way communications. Restaurants, non-food retailing, personal and business services, rental services, real estate services, and a long list of other service businesses fall into the category of business format franchising. Business format franchising has been responsible for much of the growth of franchising in the United States since 1950 and will continue to offer opportunities for those individuals seeking their own businesses.

The volume of sales and the number of units owned or franchised by business format franchisors have been steadily on the rise since 1972. Sales of business format franchisors are expected to be over \$151 billion in 1986, compared with \$135 billion in 1985 and \$122 billion in 1984. In contrast to product and tradename franchises, the number of establishments of business format franchisors is expected to increase to almost 329,000 in 1986, compared to 300,971 in 1985 and 283,576 in 1984. The number of establishments and gross sales of business format franchisors for 1972-86 are listed below:

	<u>Sales</u> (billions of dollars)	<u>Establishments</u>
1972	28.7	189,640
1973	32.7	202,237
1974	37.3	209,727
1975	40.9	210,814
1976	46.6	222,317
1977	65.8	240,524
1978	64.3	245,694
1979	72.4	252,702
1980	83.5	252,548
1981	89.1	260,555
1982	99.0	268,306
1983	110.5	276,195
1984	122.3	283,576
1985*	134.5	300,971
1986*	151.3	328,812

* Estimated

The number of business format franchisors offering their products and/or services to prospective franchisees has also been rising steadily since 1972 and this upward trend is expected for the remainder of the 1980's as more and more companies are choosing to expand their distribution of goods and services through franchising. Listed below are the number of business format franchisors that responded to our survey for the period 1972-1984:

<u>Year</u>	<u>Number of Franchisors</u>	<u>Year</u>	<u>Number of Franchisors</u>
1972	909	1978	1,394
1973	1,005	1979	1,459
1974	1,051	1980	1,584
1975	1,115	1981	1,673
1976	1,161	1982	1,770
1977	1,281	1983	1,877
		1984	1,942

Large franchisors, those with 1,000 or more units each, continue to dominate business format franchising, with 54 companies accounting for 50 percent of all sales and establishments in 1984. The total number of outlets reported by these large franchisors stood at 141,796 with sales of \$60.6 billion. Thirteen of these large franchisors were engaged in restaurants and 9 were in automotive products and services.

Sales of products and services by business format franchisors to their franchisees totaled \$6.8 billion in 1984 and might rise to about \$8.4 billion by 1986. Franchisor sales of merchandise for resale were largest in the non-food retailing category--\$2.3 billion in 1984--followed by automotive products and services at \$1.9 billion. Franchising sales of food ingredients amounted to \$1.8 billion in 1984 of which \$987 million went to restaurants and \$792 million to food retailers other than convenience stores (Table 14).

3. Trends and Outlook

The trend toward formation of franchisee advisory councils and associations, in which franchisors participate, is continuing. These forums serve not only as a place for franchisees to air out problems, but in many cases, they become the source of stimulating ideas that often lead to increased profit for both, and a strengthening of the franchise system. In terms of business relations, these forums also give franchisees a voice in the operation of the company, and serve to reduce friction points between headquarters and the franchisees before they develop into conflicts that sometimes lead to legal encounters.

The multi-unit franchise continues to gain popularity with the franchisor for related reasons. It is easier and more efficient for a franchisor to deal with a franchise holder who has a major stake in the business.

Franchising will continue to widen its scope to include a variety of service industries including a broad range of computerized services, professional services, and other areas geared to the needs of small- and medium-sized businesses. More franchising is also expected in areas that specialize in health and fitness programs and in maid services. Other areas that show growth potential are temporary help services, ice cream outlets, video equipment sales, and the automotive aftermarket.

Changing demographics, lifestyles, and purchasing patterns have caused a quiet revolution in retail marketing. Franchisors reacting to the consumer marketplace are providing additional services to meet the needs and desires of certain age, marital

status, income level, and lifestyles groups. As a result of these changes, retail franchisors are adopting new store fronts and adding new products and services, such as providing financial services catering to the desires of local customers.

In franchising, trading up (an emphasis on better quality merchandise) should assume greater importance in the years ahead. Continued growth in disposable personal income should provide the finances required to pay for merchandise needed to complement existing or desired lifestyles. Consumer exposure to alternate modes of living has been stimulated in recent years by domestic and international travel and a proliferation of visual images created by television, video, and printed material.

Non-food retailing will expand and accommodate new types of stores and products. The growth of specialty store retailers featuring specialized merchandise and services can be expected to continue. The proliferation of stores that sell or rent video cassettes and small computers and software are examples.

Food retailers will continue to seek more efficient ways of appealing to the segmented food market. They will also attempt to obtain a larger share of the consumer's budget that is normally spent in restaurants. In addition, food retailers will compete fiercely among themselves for market share.

The trend of acquisitions of franchising companies is persisting, indicating that franchising is an integral and established method of conducting a profitable business. Rising costs and the proliferation of government franchise regulations have been cited as contributing factors in the increased use of the acquisition route as a means of expanding the franchising form of distribution.

4. International Markets

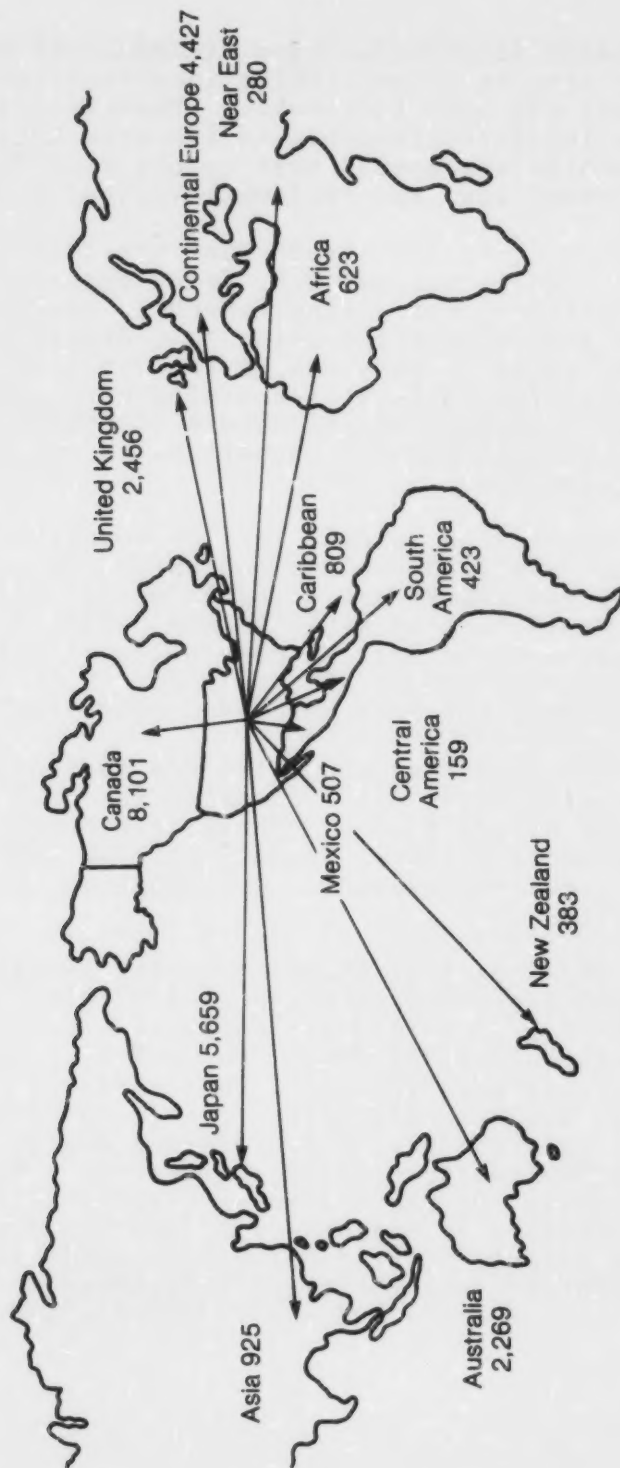
U.S. franchisors are currently operating in most major countries or are engaged in serious negotiations for the purpose of entering foreign markets, an indication that foreign nations have welcomed the entry of U.S. franchisors and that local laws and regulations have not been overly restrictive.

Franchising operations in foreign markets, however, involve many of the same problems confronting other business ventures. Language difficulties, differences in customs, and sometimes unpredictable government decision-making are examples of impediments all U.S. franchisors encounter when attempting to take advantage of opportunities in other countries.

Chart 2

International Franchising in 1984

Franchising companies . . . 328
Number of franchising outlets . . . 27,021



Compared to other service sectors, the problems of franchise companies in accomplishing international transactions are relatively less formidable. Franchisors must comply with the same local requirements as domestic businesses and the franchise agreements must comply with local contract law, antitrust law, and trademark licensing laws.

We know of no real trade barriers that discriminate specifically against U.S. franchisors. There are no specific regulations restricting franchise operations and no prohibitive laws governing franchising that differ from those which affect other types of business operations. Of course, some restrictions affect franchising more than other businesses but that is because of the nature of franchising rather than a foreign government's opposition to franchising as a system of distribution.

The population in many foreign countries is young and they like to try new products and concepts. In addition, more and more women everywhere are going to work. This not only increases the family's disposable income, which is good for franchisors in the service and consumer products business, but it also reduces the amount of time spent in the kitchen and increases the demand for food purchased away from home.

Foreign developed countries are increasingly exhibiting the same attributes which fostered the surge of service industries in the United States. These attributes include rising disposable personal income, growing demand for consumer goods and services, expanding urbanization, and higher consumer mobility.

The Department of Commerce survey reveals that 328 U.S. franchising companies operated 27,021 outlets in foreign countries in 1984; this compares with 305 franchisors with 25,682 outlets in 1983. Furthermore, an additional 137 companies have indicated that they are considering extending their U.S. operations to foreign countries by the end of 1987. This interest has been expressed mostly by small- and medium-sized franchisors, marketing a variety of services and products. Of the companies seeking foreign markets, 32 are franchisors of business aids and services and 30 are restaurant franchisors. Listed below are trends in international franchising for the years 1971-1984:

<u>Year</u>	<u>Number of U.S. Companies</u>	<u>Total Foreign Outlets</u>
1971	156	3,365
1972	175	6,153
1973	208	9,509
1974	217	9,663
1975	222	10,964
1976	234	12,348
1977	244	14,217
1978	266	17,156
1979	275	19,449
1980	279	20,428
1981	288	21,416
1982	295	23,524
1983	305	25,682
1984	328	27,021

The form of entry into foreign markets varies considerably, with many firms using more than one method in conducting foreign operations. Of the 328 franchisors doing business in foreign countries in 1984, 307 sold their outlets to franchisees--either directly or through a master licensee who received the right to develop the franchisor's system in a specific country or region--38 operated joint ventures, and 32 had some company operated units. Twenty-five of these companies derived 10 percent or more of their income from foreign operations, 31 firms received between 5 and 9 percent, 104 between 1 and 4 percent, and 168 received less than 1 percent.

Canada continues to be the dominant market for U.S. franchisors despite its declining share of U.S. foreign outlets. In 1984, 30 percent of all U.S. foreign franchised outlets were located in Canada, down from a high of 46 percent in 1971. A total of 233 U.S. franchising firms with 8,101 units operated in Canada in 1984, predominantly in restaurants (1,591), non-food retailing (1,477), and business aids and services (1,012). Japan continues to be the second largest market for U.S. franchisors with a total of 5,659 units, of which 72 percent represent various food categories such as restaurants, donut shops, ice cream stores, and convenience food stores. The United Kingdom ranks third with 2,456 outlets, while 4,427 outlets are located in all of Continental Europe. Listed below are countries or foreign regions where U.S. franchisors operated in 1984.

<u>Country or Foreign Region</u>	<u>Number of Franchisors</u>
Canada	233
Caribbean	90
Continental Europe	68
Asia (other than Japan and Middle East)	67
Australia	66
Japan	56
United Kingdom	60
Middle East	44
Mexico	35
Africa	29
South America	33
Central America	29
New Zealand	22

5. Minority Franchisees

Small investors, especially minority entrepreneurs, often face two major obstacles in their efforts to operate a successful company: inexperience in business and management, and inadequate financing. The franchising system provides a means for mitigating such barriers to entry. Under the franchise system, a franchisor usually provides managerial training and assistance on a continuing basis and, in many cases, finances the purchase of necessary equipment. The franchisor may also arrange for property leases, help obtain loans from the Small Business Administration, local banks, or other private investors, and, in some instances, may participate in the venture. In addition, franchisors generally provide such services as location analysis, advertising and merchandising, counseling and assistance, standardized procedures and operations, and, sometimes, centralized purchasing.

Reported minority ownership of business format franchising units increased by 10 percent in 1984 over 1983. Of the 1,942 franchisors surveyed, 567 companies reported a total of 8,116 units owned by minority-owned group businesspersons while 1,288 reported no minority-owned units (Table 18); the remaining 87 companies--mostly large franchisors with a total of 60,333 franchisee-owned units--were not able to respond, since they do not maintain and are not required to maintain records identifying such characteristics.

Data were not collected for automobile and truck dealers, gasoline service stations, and soft drink bottlers, but the U.S. Department of Commerce estimates that in 1984 minorities owned 10,000 gasoline service stations and 375 automobile and truck dealers. It should be pointed out that in 1984 there was a net loss of almost 4,500 gasoline service stations.

Of the 8,116 minority-owned outlets, 2,901 were owned by Blacks, and 2,641 by persons with Spanish surnames, 2,444 by Orientals, and 130 by American Indians. Many minority-owned businesses are concentrated in the most popular franchising sectors, i.e., 1,954 in restaurants, 1,380 in automotive products and services, 1,042 in food retailing other than convenience stores, 831 in convenience stores, and 651 in construction, home improvement, maintenance, and cleaning services.

6. Company Characteristics

Changes in Ownership

Changes in ownership in 1984 involved 9,447 units belonging to 898 franchisors. These changes included conversions to franchisee-owned or to company-owned, and discontinuation of either company-owned or franchisee-owned outlets. Units discontinued may include businesses that failed, but the number of failures is unknown. However, we should note that the number of units discontinued--for whatever reason--is relatively low, 3.1 percent in 1984 for franchisee-owned units.

Specifically, 577 outlets were repurchased for company-ownership, while 953 were converted to franchisee-ownership; as in previous years, the largest portion of these changes occurred in the restaurant sector of franchising. The number of establishments discontinued in 1984 stood at 7,917 of which 1,030 were company-owned and 6,887 franchisee-owned (Table 20).

Since 1975, the trend in franchising has reflected an increase in conversions of company-owned units to franchisee-ownership, and as in previous years the survey shows that most units repurchased for company-ownership were temporary buy-backs for a multitude of reasons, the least of which was the company's desire to withdraw from the franchise system or to operate these units permanently itself. Listed below are trends for conversions covering the 1971-1984 period:

<u>Year</u>	<u>Repurchase for company ownership</u>	<u>Converted to franchisee ownership</u>
1971	1,755	602
1972	1,187	601
1973	992	659
1974	878	668
1975	716	725
1976	546	956
1977	619	839
1978	612	718
1979	710	1,052
1980	808	1,012
1981	760	1,068
1982	707	1,057
1983	549	1,069
1984	577	953

Failures and Departures

A total of 46 franchisors operating 1,463 outlets failed during 1985, according to the U.S. Department of Commerce survey. The volume of 1984 sales represented by the failed firms amounted to \$219 million, of which the franchisee-owned portion was \$165 million. Compared to total business format franchising sales of \$122 billion in 1984, the lost volume (0.1 percent) should be regarded as insignificant. In addition, 79 decided in 1985 to discontinue franchising as a method of doing business; these companies operated 2,051 units in 1984 with \$336 million in sales, of which 1,858 outlets with \$252 million in sales were franchisee-owned.

The failures and departures of franchisors for 1973-85 are listed below:

<u>Year</u>	<u>Failures</u>	<u>Departures</u>	<u>Total</u>
1973	33	25	58
1974	49	40	89
1975	55	48	103
1976	39	47	86
1977	24	47	71
1978	30	44	74
1979	55	64	119
1980	42	74	116
1981	50	75	125
1982	59	61	120
1983	57	84	141
1984	56	63	119
1985	46	79	125

7. Duration of Franchise Relationships

Franchise Arrangements

The survey revealed that in 1984, 71 percent of the currently operating business format franchising companies, covering 19 broad categories, issued franchise agreements of varying lengths, many of which, especially in the retail field, were associated with a lease (Table 26). In all companies, these agreements provided an opportunity for the franchisee to enter into a new agreement at the end of the original term. Although the terms of the agreements vary all the way from one year to perpetual, over 40 percent of them are for 20 years or longer, as the following table illustrates:

<u>Year</u>	<u>Percentage</u>
1	2.0
3	2.5
5	14.9
10	29.6
15	11.6
20	21.6
25	1.5
Perpetual	13.7
Others	2.6

Renewals, Terminations, and Transfers

In 1984, 15,354 franchise arrangements came up for renewal, of which 13,950, or 91 percent, were renewed and 1,404 were not. Of the latter, 515 were not renewed because of objections by the franchisor, 547 because the franchisee did not wish to renew, and 342 by mutual agreement.

There were 6,615 terminations of franchise agreements in 1984, of which 2,649 were terminated by franchisors: 1,419 for nonpayment of royalties or other financial obligations, 270 for the franchisee's failure to comply with quality control standards, and 960 for other reasons not identified. Franchisees were responsible for terminating 3,661 franchise agreements, while an additional 305 were terminated by mutual consent.

A total of 2,628 franchisees in 1984 asked permission from their franchisors to sell their franchises to other businesspersons; all but 139 transfers were approved.

8. Retailing Dominates Franchising

Retailing dominates franchising accounting for 88 percent of all franchising receipts in 1985. The retail sales of all firms associated with franchising reached about \$468 billion in 1985, or 33 percent of all U.S. retail sales estimated at \$1.4 trillion.

Continued growth in disposable personal income should provide the finances required for future purchases. Retailing will continue to expand and accommodate new types of stores and products. The proliferation of stores that sell or rent video cassettes, small computers, and software are examples of new stores and products. For all retailing (including franchising), the greatest growth from 1975 to 1985 was by food stores, followed by building materials; eating and drinking places; furniture, home furnishings and equipment stores; and drug and proprietary stores.

The remainder of the decade should witness the continued growth of retail stores that sell at less than full mark-up. These stores include discounters, off-price outlets, warehouse operations, and deep-discount stores. The retail market and the number and variety of customers are sufficiently broad to enable each retailing concept to be a success and to provide buying opportunities for a wide variety of customers.

Restaurants (All Types)

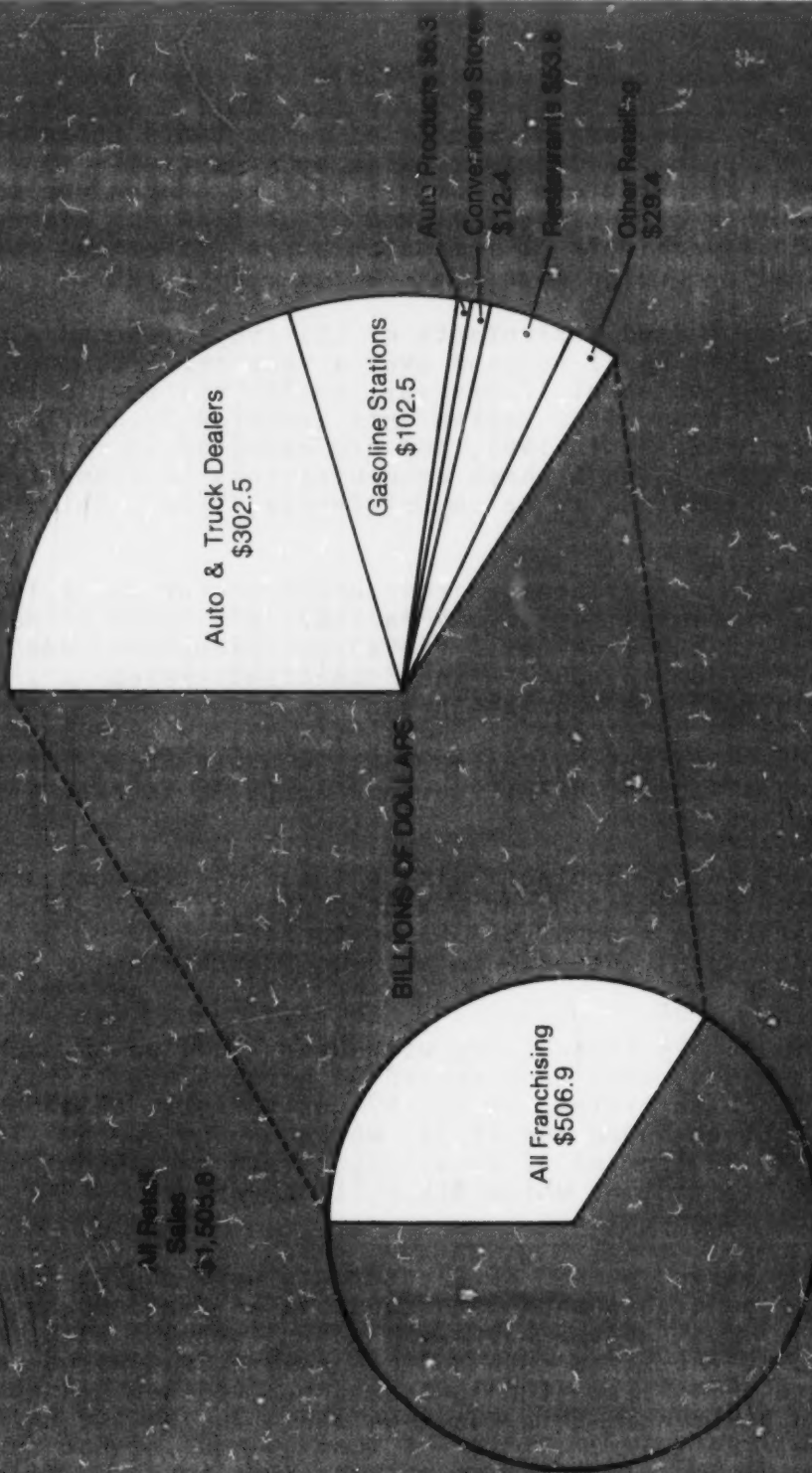
In recent years, there has been an increase in the development of theme-oriented eateries. In addition, traditional restaurants seeking to maintain and expand market share are reviewing their current operations with an eye toward upgrading their physical appearance and making other changes, such as concentrating on the sale of ethnic foods. Some have designed their facilities around a theme that highlights, for example, a bygone era or a foreign or nonlocal setting. Others arrange seating so that diners can observe meals being prepared.

Franchised restaurants, striving to maintain their strong market position, are increasing the number of their outlets by locating at bus terminals, colleges, hospitals, military bases, and other facilities. To maximize the use of facilities and raise sales, firms are introducing longer store hours, varied menus, salad bars, new products, and breakfast service.

International operations of franchised restaurants continue to expand. In 1984, 67 restaurant franchisors operated 5,990

Chart 3

Franchising to Enterprises 34% of Retail Sales in '83



units in foreign countries (see Table 63), compared to 64 restaurant franchisors and 5,516 units, a year earlier. Canada accounted for the largest number of restaurants followed closely by Japan. Restaurants with major activity in hamburgers, frankfurters and roast beef accounted for the largest number of outlets followed by chicken and pizza. Another 30 franchisors of restaurants plan to extend their operations to foreign countries by the end of 1987.

Sales of franchised restaurants of all types reached almost \$48 billion in 1985 up 11 percent over a year earlier; they are expected to jump about 12 percent, to \$54 billion in 1986 (Table 58). Franchised restaurants numbered 70,495 in 1984, increased to 75,874 in 1985, and are expected to rise to almost 83,000 in 1986. The highest concentrations of franchised restaurants continue to be in California, Texas, Ohio, and Florida.

Employment in the franchised restaurant sector was 2,182,143 in 1984, up from 1,954,646 a year earlier, a rise of 12 percent. Employment in the franchised restaurant industry accounts for 38 percent of employment in the franchised system as a whole and should continue to rise in the next few years.

Furthermore, franchised restaurant employees accounted for an estimated 42 percent of all persons employed in eating places in the United States.

During 1985, 11 franchisors with a total of 160 restaurants (128 franchisee-owned) went out of business, while 18 franchisors with a total of 353 restaurants (251 franchisee-owned), decided to abandon franchising as a method of marketing.

There were 13 big franchisors with over 1,000 units each in 1984. Combined, they represented 53 percent of all restaurants in the franchise system, or 37,467 restaurants, of which 25,680 were franchisee-owned and 11,787 were company-owned. They also represented 60 percent of total franchised restaurant sales, i.e., \$26 billion, of which \$18 billion were by franchisee-owned units.

In 1984, a larger number of restaurants were converted to franchisee-ownership than were repurchased for company operation. Most of the buy backs were temporary with the intention of reselling them to prospective franchisees at a later date. The trend for conversions of franchised restaurants since 1971 is shown below:

<u>Year</u>	<u>Units repurchased for company-ownership</u>	<u>Units converted to franchisee-ownership</u>
1971	783	158
1972	413	145
1973	533	175
1974	477	198
1975	311	184
1976	280	413
1977	305	425
1978	321	312
1979	484	579
1980	394	498
1981	489	426
1982	475	389
1983	279	352
1984	328	339

To compete with other restaurant chains, many franchise operators have become more customer-oriented, and are offering such amenities as waiter/waitress service or self-service and/or drive-in/drive-thru service. Most restaurants offer one type or the other; 20 franchisors offer both types of services, although one type clearly dominates. Listed below are the principal types of services provided by franchised restaurant chains in 1984:

	<u>Self-service, drive-in and drive-thru</u>	<u>Waiter or waitress service</u>
Chicken	30	3
Hamburgers, etc.	101	4
Pizza	68	36
Mexican	22	14
Seafood	9	3
Pancakes, waffles	0	13
Steak, full menu	17	94
Sandwich and other	47	4
Total	294	171

Convenience Stores

Convenience food stores are an important factor in food retailing. Because of changing demographics and lifestyles, they have expanded rapidly, evolving into a large and sophisticated segment of food retailing. Many resemble scaled-down, modern supermarkets and offer on-premises food service facilities and self-service gasoline.

Currently, food service, i.e., restaurant style foods and beverages prepared in the store for consumption elsewhere, are becoming more important. Almost all convenience stores offer some type of food service, at least hot beverages and fresh pastries. Many stores offer a wide variety of food service items: cold sandwiches, hot sandwiches, pizza, and fried chicken. Many stores have installed bulk soft drink (post-mix) dispensing apparatus because of higher profit margins compared with bottled beverages.

Despite intensified competition from supermarkets offering extended hours and Sunday shopping, sales moved up 6 percent to \$10.9 billion in 1985. The number of franchised stores in 1985 was reported to be 15,314, up 2.4 percent. Further gains are expected in 1986, 13 percent in sales and 5.3 percent in stores (Table 52).

Food Retailing Other Than Convenience Stores

The retailing of food by specialty food shops, ice cream stores, coffee services, donut shops, bakeries, cookie shops, candy stores, nut stores, and others, amounted to \$9.1 billion in 1985, 5 percent over the previous year; sales in 1986 are expected to reach \$9.9 billion. In 1986, the number of units is expected to rise to 20,153, a jump of 14 percent over the year before (Table 83).

Two of the better known groups in this category are donut shops and ice cream and yogurt stores. The sales and establishments for these specialty stores for 1984-86 are listed below:

Donut Shops (21 franchisors - 29,824 employees in 1984)						
Sales (\$000)				Units		
Year	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
1984	756,591	88,063	668,528	2,318	218	2,100
1985*	842,901	95,145	747,756	2,464	221	2,243
1986*	960,601	102,967	857,634	2,698	224	2,474

* Estimated by respondents.

Ice Cream and Yogurt Stores
(49 franchisors - 51,680 employees in 1984)

Year	Sales (\$000)			Units		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
1984	944,693	55,977	888,716	6,736	202	6,534
1985*	1,059,589	71,310	988,279	7,717	250	7,467
1986*	1,273,290	95,405	1,177,885	9,038	340	8,698

* Estimated by respondents

Non-Food Merchandising

Changing economic and demographic factors have created a large, sophisticated, and dynamic group of consumers. Retailing of non-food general merchandise items is now a more competitive category because of improved buying and selling systems, new and better products, and new management techniques developed in recent years. To satisfy this growing trend, retailers are turning in large numbers to franchising. Thus, while in 1979 there were 207 franchisors engaged in non-food retailing, in 1984 their number grew to 291.

This category includes a wide assortment of general merchandise such as catalog stores, home appliances, drugs and cosmetics, gift shops, furniture, home furnishings, shoes and apparel, sporting goods, hardware, paints, consumer electronics, computers, and others. In 1985, total sales on non-food retailing are estimated at \$17.2 billion and are expected to reach \$19.5 billion in 1986. The number of outlets is also expected to climb from 42,269 to 45,263 (Table 80).

Auto Products and Services

Receipts of auto products and service franchises will rise from \$10.1 billion in 1985 to an estimated \$11.3 billion in 1986, while total establishments are expected to grow from 36,200 to 38,191 (Table 30).

Retail outlets of tire manufacturers lead the auto product and service field with nearly 41 percent of total sales in 1984. In addition to selling tires, radio and television sets, and other household appliances, most of these outlets perform a full range of auto services.

Higher costs of automobiles and auto repairs are encouraging more car owners to undertake their own repairs, a fact that provides considerable opportunities for merchandising the many tools and items needed by the home auto mechanic.

Other franchises in the category of auto products and services include small and specialized car washes, muffler shops, brake parts and diagnostic shops, and lube and oil change centers--all growing in sales and number. Inducing this growth is a rising demand for service (an outgrowth of engineering changes and additional safety equipment in autos) and consumer convenience. Car washes, spreading more and more to the suburbs, have proved their popularity with car owners who prefer the quick self-service method.

9. Leisure and Travel Business

Americans are increasing their weekend and vacation travel, which, although affected periodically by changes in the economy, has grown steadily in recent years. Factors that have fostered this growth include expanded leisure time, rising disposable personal income, stable gasoline prices, and the mounting number of single-member households. With sales estimated at \$16.4 billion in 1985, franchisors expect an 11 percent increase in 1986, to an estimated \$18.2 billion. The number of establishments is also expected to increase from 15,382 in 1985 to 16,767 the following year.

Hotels, Motels and Campgrounds

Occupancy rates in the lodging industry should be about 65 percent in 1985 with a stronger showing in 1986. Business travel generally accounts for more than 60 percent of the rooms occupied, with the balance split almost equally between pleasure and convention travel. Pleasure travel, although influenced inevitably by fluctuations in the economy has grown steadily in recent years.

There is a trend among hotel chains to provide a variety of locations and hotel types to meet all levels of the market rather than a specific market segment. This diversification may take the form of luxury properties, an all-suite chain, a line of moderately-priced hotels and a budget chain. New rooms coming available are mostly in the budget hotels, airport hotels, and all suite properties. Hotel, motel, and campground franchisors in 1985 represented 7,639 establishments, with receipts estimated at \$14.3 billion. Receipts are expected to rise 9 percent in 1986 over 1985, reaching almost \$15.5 billion

(Table 64). Total receipts for the lodging industry are estimated at \$42.1 billion in 1985 of which 34 percent is accounted for by hotels and motels in the franchise system.

Recreation, Entertainment, and Travel

While the basic 40-hour work week has remained unchanged since the early 1950's, the advent of the 4-day work week and the introduction of flexitime has helped considerably in creating more leisure time. The average worker is also enjoying longer vacations and more holidays. The number of Americans expected to take a vacation trip will grow in 1986 as these trips get longer in both distance and duration. Franchising firms engaged in the recreation, entertainment, and travel business, report estimated sales of \$2.2 billion in 1985. In 1986, they are expected to climb to \$2.7 billion (Table 71).

10. Business and Personal Services

The rising demand for a variety of business and personal services, reflecting changing business service needs and shifting consumer spending patterns, are creating numerous opportunities for the franchise entrepreneur. An ever-widening array of business firms are now relying on franchised establishments for such basic requirements as automobile and truck rentals, printing and copying services, tax preparation, accounting, educational, and other business aids and services.

Business Aids and Services

Franchised businesses in this group include tax preparation, accounting, general business systems, employment services, printing and copying services, real estate, and a miscellaneous business sector that covers such diverse fields as the installation of security systems, business brokers, advertising, consulting services, marketing research, computer systems, fund raising, and others. Total sales for this group are expected to increase from \$11.3 billion in 1985 to \$13.0 billion in 1986, while the number of units will go from 50,939 to 56,635. As the economic recovery took off in 1984, franchised real estate gross commissions began to improve and reached \$4.1 billion in 1985; they are expected to go up over 12 percent in 1986 to \$4.6 billion. The number of real estate brokers in the franchise system should also go up, from 13,803 in 1985 to 15,010 by the end of 1986.

Employment agencies, made up of firms that concentrate on placing professional, middle-, and upper-management personnel as well as clerical personnel and temporary help, rebounded in 1985 reaching 4,725 units, and will then rise by almost 10 percent in 1986 to 5,218 units. Receipts in 1985 totalled \$2.9 billion rising to \$3.3 billion in 1986.

Printing and copying services have been a high growth area for many years and can be expected to continue their expansion and very likely accelerate over the next few years. Franchised outlets engaged in the printing and copying services stood at 4,864 in 1985, producing sales of \$874 million. The number of outlets should advance to 5,607 in 1986 with sales of 1 billion. Almost 34 percent of the outlets reported in 1983 were located in three states, California, Texas, and Florida.

Auto and Truck Rental Services

In a move to increase revenues, rental companies are stressing increased services, more movement into leasing, and new marketing procedures. Nearly all are offering flat fees with unlimited mileage. Some are stressing express booths at airports to speed up the rental process, and are aggressively selling to business executives and corporate accounts. Receipts of these firms have moved up to \$5.5 billion in 1985 and are expected to rise by 14 percent to \$6.2 billion in 1986. The number of outlets should reach 11,764 in 1985 and increase by almost 6 percent to an estimated 12,464 in 1986 because of increased activities by leasing companies (Table 74).

Construction, Home Improvements, and Cleaning Services

Franchising is a leading force in the growth of on-location cleaning of carpeting and upholstery in homes, mothproofing, soil and flame retarding treatments, static removal, and minor carpet repairing. Some firms furnish complete professional cleaning services that include the cleaning of walls, floors, and fixtures, while others specialize in sewer and drain-cleaning services. Lawn and garden franchise services range from automated lawn care to consultation and analysis of lawn problems. Franchising has also pressed ahead in home remodeling construction while other maintenance and improvement franchising businesses specialize in a variety of services such as water conditioning, porcelain and furniture refurbishing and repair, and home remodeling.

Receipts of \$3.3 billion are estimated for 1985 in this diverse category, and are anticipated to rise to about \$3.8 billion in 1986. There were 16,895 establishments in construction, home improvement, maintenance, and cleaning services in 1985, estimated to rise to 18,996 in 1986 (Table 49).

Laundry and Drycleaning Services

The impact of new textile developments and improved home laundering equipment continue to lower consumer demand for professional laundry and drycleaning services. Many franchised laundry and drycleaning establishments have broadened their services to include drapery processing, rental of units to

clean rugs at home, and alteration work. Receipts of franchised laundries and drycleaners are estimated at \$298 million in 1985 and are anticipated to rise to \$331 million by the end of 1986. The number of outlets is expected to reach 2,711 in 1985 and should expand by about 3 percent in 1986 (Table 68).

Equipment Rentals

Franchised rental equipment activities account for only a small share of all equipment rental receipts, and in 1985 there were 2,555 outlets renting all kinds of consumer products--such as party supplies, gardening supplies, tools, light construction machinery, home-use medical equipment--with estimated sales of \$706 million in 1985 that could rise to \$807 million by the end of 1986. The number of outlets should increase by 15 percent to 2,936 in 1986 (Table 77).

Educational Services

Businesses engaged in franchising educational services tend to be extremely specialized. For instance, increased leisure time has created a growing market for dietary and exercise training centers that have been successfully promoted by many franchised systems. Franchisors have also entered the growing field of early childhood education with establishment of day-care centers with modern learning and play equipment. Sales of educational service enterprises are expected to reach \$743 million in 1985, rising to \$839 million in 1986. The number of establishments is expected to increase from 7,969 units in 1985 to 8,929 in 1986 (Table 55).

The dominant type of franchisor operating in this category--in number of units and sales--is weight reduction/diet control firms. The units and sales of the franchisors offering various types of weight control and reduction programs for 1984-86 are listed below:

Diet Services (18 franchisors - 25,304 employees in 1984)

Year	Sales (\$000)			Units		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
1984	467,104	72,677	394,427	3,235	279	2,956
1985*	501,454	79,610	421,844	3,383	279	3,104
1986*	539,964	84,645	455,319	3,582	295	3,287

*Estimated by respondents

Beauty Salons

Securing a foothold in the franchise system is the hair salon enterprise. Growth in this area is attributable to the trend toward unisex and minimum care hair styles. Sales and number of hair salons for the years 1984-86 are listed below:

Beauty Salons
(19 franchisors - 25,488 employees in 1984)

Year	Sales (\$000)			Units		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
1984	443,855	45,273	397,582	2,601	253	2,348
1985*	553,590	53,190	500,400	3,199	268	2,931
1986*	700,170	64,300	635,870	4,033	334	3,699

* Estimated by respondents.

FRANCHISING IN THE ECONOMY: 1984

TABLE 1

Kinds of Franchised Business	Establishments (Number)		Sales (\$'000)	
	Total	Company-Owned	Total	Company-Owned
TOTAL - ALL FRANCHISING	444,299	86,964	492,087,622	63,637,265
Automobile and Truck Dealers ^{1/}	27,125	0	252,063,000	0
Automotive Products and Services ^{2/}	35,111	4,350	9,186,427	2,843,936
Business Aids and Services	47,294	6,398	9,791,128	1,954,278
Accounting, Credit, Collection Agencies, and General Business Systems	2,255	38	162,027	12,382
Employment Services	4,444	1,548	2,513,827	1,124,633
Printing and Copying Services	4,257	97	745,162	18,716
Tax Preparation Services	8,515	3,774	434,856	230,943
Real Estate ^{3/}	12,950	311	3,696,859	84,571
Miscellaneous Business Services	14,873	630	2,238,397	483,033
Construction, Home Improvement, Maintenance and Cleaning Services	16,862	644	3,121,764	1,103,476
Convenience Stores	14,960	8,507	10,292,508	6,306,904
Educational Products and Services	7,286	701	684,419	153,833
Restaurants (All Types)	70,495	22,951	43,433,782	16,393,552
Gasoline Service Stations ^{1/}	132,080	23,774	100,997,000	18,179,000
Hotels, Motels and Campgrounds	6,914	1,025	13,159,020	4,061,835
Laundry and Drycleaning Services	2,801	163	286,062	36,022
Recreation, Entertainment and Travel	7,197	381	1,809,935	672,363
Rental Services (Auto-Truck)	11,253	2,333	4,966,400	2,897,076
Rental Services (Equipment)	2,324	461	639,206	212,957
Retailing (Non-Food)	39,970	12,249	15,527,699	5,200,109
Retailing (Food Other Than Convenience Stores)	16,202	2,418	8,630,991	2,159,503
Soft Drink Bottlers ^{1/ 3/}	1,518	95	16,700,000	1,336,000
Miscellaneous	4,837	514	798,281	126,421

^{1/} Estimated by ITA based on Bureau of the Census and trade association data.^{2/} Includes some establishments with significant sales of non automotive products such as household appliances, garden supplies, etc.^{3/} Includes soft drinks, fruit drinks and ades; syrups, flavoring agents and bases. Data do not include figures for independent private label and contract-filler bottling companies which account for 22 percent in 1984, 22 percent in 1985 and 22 percent in 1986 of the value of shipments of the total industry.^{4/} Revised.^{5/} Gross commissions.

TABLE 2
FRANCHISING IN THE ECONOMY: 1985*

Kinds of Franchised Business	Establishments (Number)		Sales (\$'000)		Percent Change 1984-1985 Estab. Sales			
	Total	Company- Owned	Franchisee- Owned	Franchisee- Owned				
TOTAL - ALL FRANCHISING	454,212	88,160	366,052	530,117,141	67,789,838	462,327,303	2.2	7.7
Automobile and Truck Dealers <u>1/</u>	27,250	0	27,250	277,018,000	0	277,018,000	0.5	9.9
Automotive Products and Services <u>2/</u>	36,200	4,572	31,628	10,098,842	3,199,823	6,899,019	3.1	9.9
Business Aids and Services	50,939	6,540	44,399	11,329,791	2,176,062	9,153,729	7.7	15.7
Accounting, Credit, Collection Agencies and General Business Systems	2,366	32	2,334	166,081	12,985	153,096	4.9	2.5
Employment	4,755	1,637	3,118	2,893,633	1,268,509	1,625,124	7.0	15.1
Printing and Copying Services	4,864	104	4,760	873,903	21,403	852,500	14.3	17.3
Tax Preparation Services	8,843	3,805	4,838	459,098	242,694	216,404	1.5	5.6
Real Estate <u>5/</u>	13,803	263	13,540	4,138,535	87,515	4,051,020	6.6	11.9
Miscellaneous Business Services	16,508	699	15,809	2,798,541	542,956	2,255,585	11.0	25.0
Construction, Home Improvement, Maintenance and Cleaning Services	16,895	659	16,236	3,325,804	1,170,728	2,155,076	0.2	6.5
Convenience Stores	15,314	8,796	6,518	10,911,314	6,685,410	4,225,904	2.4	6.0
Educational Products and Services	7,969	723	7,246	742,751	163,556	579,195	9.4	8.5
Restaurants (All Types)	75,874	24,580	51,294	48,008,573	18,204,720	29,803,853	7.6	10.5
Gasoline Service Stations <u>1/</u>	124,600	22,428	102,172	100,492,000	18,089,000	82,403,000	- 5.7	- 0.5
Hotels, Motels and Campgrounds	7,639	1,081	6,558	14,261,153	4,361,525	9,899,628	9.4	8.4
Laundry and Drycleaning Services	2,711	156	2,555	297,650	38,040	259,610	- 3.2	4.1
Recreation, Entertainment and Travel	7,743	432	7,311	2,172,280	738,760	1,433,520	7.6	20.0
Rental Services (Auto-Truck)	11,764	2,385	9,379	5,450,875	3,182,490	2,268,385	4.5	9.8
Rental Services (Equipment)	2,555	506	2,049	706,712	240,692	466,020	9.9	10.6
Retailing (Non-Food)	42,269	12,330	29,939	17,221,196	5,745,201	11,475,995	5.8	10.9
Retailing (Food Other Than Convenience Stores)	17,617	2,506	15,111	9,069,933	2,237,644	6,832,289	8.7	5.1
Soft Drink Bottlers <u>1/ 3/</u>	1,391	105	1,286	18,100,000	1,448,000	16,652,000	- 8.4	8.4
Miscellaneous	5,482	361	5,121	910,267	108,187	802,080	13.3	14.0

* 1985 data estimated by respondents.

See Footnotes on TABLE 1.

TABLE 3

FRANCHISING IN THE ECONOMY: 1986*

Kinds of Franchised Business	Establishments (Number)		Sales (\$'000)		Percent Change 1985-1986		Percent Change 1984-1986	
	Total	Company-Owned	Franchisee-Owned	Total	Estab.	Sales	Estab.	Sales
TOTAL - ALL FRANCHISING	478,452	91,038	387,414	575,768,773	5.3	8.6	7.7	17.0
Automobile and Truck Dealers ^{1/}	27,340	0	27,340	302,498,000	0.3	9.2	0.8	20.0
Automotive Products and Services ^{2/}	38,191	4,832	33,359	11,334,038	5.5	12.2	8.8	23.4
Business Aids and Services	56,635	6,716	49,919	13,065,707	11.2	15.3	19.8	33.4
Accounting, Credit, Collection Agencies and General Business Systems	2,648	33	2,615	193,081	11.9	16.3	17.4	19.2
Employment Services	5,218	1,731	3,487	3,291,784	9.7	13.8	17.4	30.9
Printing and Copying Services	5,607	110	5,497	1,425,283	15.3	20.0	31.7	40.7
Tax Preparation	8,792	3,838	4,954	23,976	1.7	5.8	3.3	11.5
Real Estate ^{3/}	15,010	169	14,841	484,738	8.7	12.3	15.9	25.7
Miscellaneous Business Services	19,360	835	18,525	4,646,060	17.3	21.5	30.2	52.0
Construction, Home Improvements, Maintenance and Cleaning Services	18,996	721	18,275	3,772,354	12.4	13.4	12.7	20.8
Convenience Stores	16,120	9,204	6,916	12,363,139	5.3	13.3	7.8	20.1
Educational Products and Services	8,929	781	8,148	838,827	12.0	12.9	22.6	22.6
Restaurants (All Types)	82,923	26,664	56,259	53,809,508	9.3	12.1	17.6	23.9
Gasoline Service Stations ^{1/}	121,000	21,780	99,220	102,502,000	- 2.9	2.0	- 8.4	1.5
Hotels, Motels and Campgrounds	8,393	1,187	7,206	15,511,833	9.9	8.8	20.2	17.9
Laundry and Drycleaning Services	2,781	168	2,613	331,130	2.6	11.2	- 0.7	15.8
Recreation, Entertainment and Travel	8,374	496	7,878	2,735,525	8.1	25.9	16.4	51.1
Rental Services (Auto-Truck)	12,461	2,444	10,017	6,207,950	5.9	13.9	10.7	25.0
Rental Services (Equipment)	2,936	582	2,354	807,383	14.9	14.2	26.3	26.3
Retailing (Non-Food)	45,263	12,170	33,093	19,456,827	7.1	13.0	13.2	25.3
Retailing (Food Other Than Convenience Stores)	20,1 ⁵³	2,741	17,412	9,916,083	14.4	9.3	24.4	14.9
Soft Drink Bottlers ^{1/ 3/}	1,300	115	1,185	19,500,000	- 6.5	7.7	-14.4	16.8
Miscellaneous	6,657	437	6,220	1,118,459	21.4	22.9	37.6	40.1

* 1986 data estimated by respondents.

See Footnotes on TABLE 1.

TABLE 4
SALES (\$000) - 1969-1971

Kinds of Franchised Business	1969		1970		1971	
	Total	Company-Owned	Total	Company-Owned	Total	Company-Owned
TOTAL - ALL FRANCHISING <u>4/</u>	112,797,165	19,074,865	93,722,300	116,567,684	20,640,798	95,926,886
Automobile and Truck Dealers <u>1/ 4/</u>	58,085,000	580,000	57,505,000	55,622,000	556,000	55,066,000
Automotive Products and Services <u>2/</u>	1,802,021	381,771	1,420,250	1,936,412	408,040	1,528,372
Business Aids and Services	664,660	289,418	375,242	723,031	299,175	423,856
Accounting, Credit, Collection Agencies and General Business Systems	16,780	2,114	14,666	20,156	2,891	17,265
Employment Services	496,250	248,087	248,163	516,322	241,220	275,102
Printing and Copying Services	7,904	1,576	6,328	11,757	2,164	9,593
Tax Preparation Services	60,063	33,603	26,460	85,343	48,020	37,323
Miscellaneous Business Services	83,663	4,038	79,625	89,453	4,860	84,573
Construction, Home Improvement, Maintenance and Cleaning Services	50,012	24,069	25,943	63,249	28,259	34,990
Convenience Stores	1,456,078	800,887	655,191	1,727,116	932,537	794,579
Educational Products and Services	75,764	16,190	59,574	85,974	16,616	69,358
Restaurants (All Types)	3,790,126	892,382	2,897,744	4,602,111	1,123,314	3,478,797
Gasoline Service Stations <u>1/ 4/</u>	26,649,000	5,330,000	21,319,000	29,340,000	5,868,000	23,472,000
Hotels and Motels	3,222,919	831,703	2,391,216	3,539,914	911,169	2,628,745
Campgrounds	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Laundry and Drycleaning Services	132,450	8,483	123,967	143,713	8,236	135,477
Recreation, Entertainment and Travel	48,270	1,058	47,212	77,187	2,981	74,206
Rental Services (Auto-Truck)	{ 991,666	631,241	360,425	1,176,948	715,985	460,963
Rental Services (Equipment)						
Retailing (Non-Food)	12,179,150	9,138,917	3,040,233	13,133,434	9,584,823	3,548,611
Retailing (Food Other Than Convenience Stores)	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Soft Drink Bottlers <u>1/ 3/</u>	3,399,000	126,000	3,273,000	4,102,000	153,000	3,949,000
Miscellaneous	251,049	22,746	228,303	294,595	32,663	261,932

See Footnotes on TABLE 1.

N.A. - Not Available

TABLE 5

SALES (\$000) - 1972-1974

Kinds of Franchised Business	1972		1973		1974	
	Total	Company-Owned	Total	Company-Owned	Total	Company-Owned
TOTAL - ALL FRANCHISING $\frac{1}{4}$ /	143,894,780	16,817,453	163,738,183	19,720,281	168,548,606	22,484,130
Automobile and Truck Dealers $\frac{1}{4}$ /	76,460,000	700,000	87,641,000	876,000	81,135,000	743,000
Automotive Products and Services $\frac{2}{1}$ /	4,441,125	1,514,950	4,559,120	1,794,216	4,685,163	1,780,430
Business Aids and Services	970,253	311,227	1,179,361	324,576	1,304,462	309,123
Accounting, Credit, Collection Agencies and General Business Services	33,652	7,617	107,257	12,156	138,054	10,331
Employment Services	487,368	222,627	494,314	213,357	496,473	185,366
Printing and Copying Services	38,567	3,564	55,793	4,281	82,972	6,109
Tax Preparation Services	105,659	62,227	117,333	67,830	145,966	78,385
Miscellaneous Business Services	305,007	15,192	404,664	26,952	440,997	28,932
Construction, Home Improvement, Maintenance and Cleaning Services	680,067	66,170	730,302	66,860	675,001	43,655
Convenience Stores	2,669,676	1,688,031	3,039,509	1,751,580	3,464,296	1,997,466
Educational Products and Services	192,694	48,931	178,953	28,222	153,579	25,593
Restaurants (All Types)	6,797,405	1,753,297	8,534,094	2,604,851	10,350,567	3,335,338
Gasoline Service Stations $\frac{1}{4}$ /	33,389,000	6,678,000	37,666,000	7,533,000	43,829,000	8,766,000
Hotels and Motels	3,623,062	1,097,338	3,733,927	1,311,301	4,510,619	1,434,230
Campgrounds	38,958	2,114	62,061	5,241	61,090	3,266
Laundry and Drycleaning Services	220,330	11,488	235,306	10,514	236,626	9,822
Recreation, Entertainment and Travel	135,296	19,218	116,444	9,929	134,851	20,774
Rental Services (Auto-Truck)	1,079,922	802,392	1,161,178	827,372	1,232,952	794,287
Rental Services (Equipment)	105,291	34,449	133,693	41,011	126,344	44,159
Retailing (Non-Food)	6,896,804	1,772,677	7,768,813	2,086,206	8,671,685	2,549,286
Retailing (Food Other Than Convenience Stores)	652,929	102,352	934,104	190,935	1,267,713	331,855
Soft Drink Bottlers $\frac{1}{3}$ /	5,378,000	199,000	5,698,000	211,000	6,305,000	233,000
Miscellaneous	163,968	15,819	366,318	47,467	404,658	62,846

See Footnotes on TABLE 1.

SALES (\$000) - 1975-1977

Kinds of Franchised Business	1975			1976			1977		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING <u>4/</u>	185,788,927	24,704,650	161,084,277	217,886,006	27,480,225	190,405,781	261,706,669	31,682,799	230,023,870
Automobile and Truck Dealers <u>1/ 4/</u>	89,195,000	892,000	88,303,000	110,905,000	1,044,000	109,861,000	129,882,000	1,168,000	128,714,000
Automotive Products and Services <u>2/</u>	5,006,200	1,885,692	3,120,508	5,643,439	1,878,900	3,764,539	6,515,321	2,199,711	4,315,610
Business Aids and Services	1,396,966	338,570	1,058,396	1,812,529	456,482	1,356,047	3,388,914	563,089	2,825,825
Accounting, Credit, Collection Agencies and General Business Services	165,411	6,056	159,355	178,265		172,064			
Employment Services	553,309	205,772	347,537	747,033	281,399	465,634	140,176	8,380	131,796
Printing and Copying Services	84,327	8,699	75,628	123,968	14,174	109,794	896,031	349,372	546,709
Tax Preparation Services	160,509	90,065	70,444	181,585	101,773	79,812	181,556	12,799	168,757
Real Estate <u>2/</u>	237,264	2,250	235,014	408,232	24,895	383,337	211,966	113,736	98,230
Miscellaneous Business Services	196,146	25,728	170,418	173,446	28,040	145,406	1,728,790	36,539	1,692,251
Construction, Home Improvement, Maintenance and Cleaning Services							230,345	42,263	188,082
Convenience Stores	639,128	42,688	596,440	782,661	71,248	711,433	1,090,737	83,464	1,007,273
Educational Products and Services	3,905,600	2,234,547	1,671,053	3,719,485	2,274,340	1,445,145	4,319,743	2,457,740	1,862,003
Restaurants (All Types)	172,694	39,306	133,388	169,597	34,021	135,576	233,440	44,779	188,661
Gasoline Service Stations <u>1/ 4/</u>	12,261,964	4,017,861	8,244,103	14,606,313	4,647,136	9,959,177	18,190,404	5,653,160	12,527,244
Hotels and Motels	47,547,000	9,509,000	38,038,000	51,949,000	10,390,000	41,559,000	56,468,000	11,294,000	45,174,000
Campgrounds	4,539,904	1,443,695	3,096,209	4,769,475	1,534,705	3,234,770	5,148,863	1,578,275	3,570,588
	60,954	4,760	56,194	85,979	4,450	81,521	108,892	5,817	103,075
Laundry and Drycleaning Services	214,209	13,337	200,872	170,620	14,222	164,398	229,237	10,959	218,278
Recreation, Entertainment and Travel	162,265	26,219	136,046	186,692	23,125	163,567	239,644	26,011	213,633
Rental Services (Auto-Truck)	1,474,597	964,205	510,392	1,650,197	1,066,788	583,409	2,105,809	1,259,599	846,210
Rental Services (Equipment)	156,819	41,642	114,977	168,103	41,673	126,430	192,219	62,799	129,420
Retailing (Non-Food)	9,031,073	2,557,428	6,473,645	10,067,882	2,890,289	7,177,593	10,329,838	3,510,920	6,818,918
Retailing (Food Other Than Convenience Stores)									
Soft Drink Bottlers <u>1/ 3/ 4/</u>	1,445,290	324,724	1,120,566	2,306,274	730,920	1,575,354	3,231,446	1,350,113	1,881,333
Miscellaneous	8,165,000	302,000	7,863,000	8,429,000	287,000	8,142,000	9,577,000	326,000	9,251,000
	414,464	66,976	347,488	455,740	90,918	364,822	435,162	88,363	346,799

See Footnotes on TABLE 1.

TABLE 7

SALES (\$000) - 1978-1980

Kinds of Franchised Business	1978			1979			1980		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING $\frac{4}{1}$	282,214,104	35,369,208	246,844,896	313,343,884	39,784,507	273,559,377	334,374,939	48,472,518	285,902,421
Automobile and Truck Dealers $\frac{1}{1} \frac{4}{4}$	147,274,000	1,105,000	146,169,000	155,738,000	942,000	154,796,000	143,861,000	757,000	143,104,000
Automotive Products and Services $\frac{2}{1}$	6,803,045	2,221,505	4,581,540	7,226,822	2,162,771	5,064,051	7,083,836	2,265,366	4,818,470
Business Aids and Services	5,046,385	688,509	4,357,876	6,280,412	871,930	5,408,482	6,748,747	1,171,622	5,577,125
Accounting, Credit, Collection Agencies and General Business Systems	148,039	6,836	141,203	127,990	5,756	122,234	120,692	9,588	111,104
Employment Services	1,113,631	406,834	706,797	1,417,001	541,100	875,901	1,593,500	651,709	941,791
Printing and Copying Services	236,598	14,305	222,293	302,843	10,684	292,159	364,873	18,768	346,105
Tax Preparation Services	242,142	129,235	112,907	255,902	136,852	119,050	289,274	156,133	133,141
Real Estate $\frac{5}{1}$	3,031,012	81,478	2,949,534	3,840,116	122,471	3,717,645	3,555,538	124,635	3,430,903
Miscellaneous Business Services	274,963	49,821	225,142	336,560	55,067	281,493	824,870	210,789	614,081
Construction, Home Improvement, Maintenance and Cleaning Services	1,269,384	174,866	1,094,518	1,382,273	230,479	1,151,794	1,474,862	226,946	1,247,916
Convenience Stores	5,012,589	2,886,746	2,125,843	6,131,865	3,604,642	2,527,243	7,821,186	4,722,845	3,098,341
Educational Products and Services	284,342	60,909	223,433	266,549	62,684	203,864	338,809	70,120	268,681
Restaurants (All Types)	21,100,788	6,733,545	14,367,243	24,765,916	8,076,401	16,689,515	27,867,046	9,129,708	18,737,338
Gasoline Service Stations $\frac{1}{1} \frac{4}{4}$	59,863,000	11,933,000	47,930,000	73,202,000	13,908,000	59,294,000	93,624,000	17,789,000	75,835,000
Hotels and Motels	5,551,477	1,742,812	3,808,665	6,625,437	1,971,093	4,654,344	9,505,667	2,440,795	7,064,872
Campgrounds	112,964	6,386	106,578	98,558	6,835	91,723			
Laundry and Drycleaning Services	244,641	16,163	228,478	263,283	21,857	246,426	285,514	23,248	262,266
Recreation, Entertainment and Travel	290,882	22,603	268,279	359,573	27,957	331,616	515,981	28,076	487,905
Rental Services (Auto-Truck)	2,526,423	1,561,029	965,394	2,889,601	1,762,482	1,127,119	3,145,745	1,873,768	1,271,977
Rental Services (Equipment)	236,299	74,888	161,411	289,485	90,429	199,056	355,777	101,871	253,906
Retailing (Non-Food)	9,334,697	3,573,041	5,761,656	8,901,928	3,294,139	5,607,789	10,517,192	4,770,153	5,747,039
Retailing (Food Other Than Convenience Stores)	6,119,548	1,728,747	4,390,801	6,512,121	1,871,880	4,640,241	7,429,528	2,090,712	5,338,816
Soft Drink Bottlers $\frac{1}{1} \frac{3}{3} \frac{4}{4}$	10,960,000	767,000	10,193,000	12,042,000	843,000	11,199,000	13,353,000	935,000	12,418,000
Miscellaneous	283,640	72,459	211,181	363,042	35,928	327,114	447,049	76,280	370,769

See Footnotes on TABLE 1.

TABLE 8

SALES (\$000) - 1981-1983

Kinds of Franchised Business	1981			1982			1983		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING $\frac{4}{4}$	364,773,276	50,604,932	314,168,344	375,969,365	54,843,867	321,125,498	422,830,992	59,163,993	363,666,999
Automobile and Truck Dealers $\frac{1}{4}$	159,376,000	278,000	159,098,000	157,238,000	0	157,238,000	192,991,000	0	192,991,000
Automotive Products and Services	8,039,069	2,436,912	5,602,157	8,278,361	2,609,605	5,668,756	8,724,942	2,894,465	5,830,477
Business Aids and Services	7,339,549	1,334,546	6,005,003	7,803,706	1,570,896	6,232,810	8,593,422	1,652,242	6,941,180
Accounting, Credit, Collection Agencies and General Business Systems	125,147	8,951	116,196	150,171	13,454	136,717			
Employment Services	1,782,214	772,423	1,009,791	1,716,157	766,969	949,188	159,410	14,801	144,609
Printing and Copying Services	450,377	18,531	431,846	561,566	23,841	537,725	2,023,285	931,028	1,092,257
Tax Preparation Services	332,100	177,279	154,821	363,140	189,054	174,086	638,808	22,363	616,545
Real Estate	3,373,880	120,272	3,253,608	3,141,764	273,453	2,868,311	349,997	178,102	170,995
Miscellaneous Business Services	1,275,831	237,090	1,038,741	1,870,908	304,125	1,566,783	3,217,019	88,625	3,128,394
Construction, Home Improvement, Maintenance and Cleaning Services							3,205,703	417,323	1,788,380
Convenience Stores	1,740,365	257,318	1,483,047	2,194,698	728,981	1,465,717	2,700,227	965,268	1,734,959
Educational Products and Services	8,405,986	4,897,308	3,508,678	9,817,511	6,119,318	3,698,193	10,148,118	6,388,603	3,759,515
Restaurants (All Types)	434,186	81,728	352,458	566,705	105,068	460,637	600,350	140,529	459,821
Gasoline Service Stations $\frac{1}{4}$	30,042,348	10,783,206	19,259,142	33,695,298	11,747,358	21,947,940	38,691,594	14,244,416	24,447,178
Hotels, Motels and Campgrounds	101,665,000	18,300,000	83,365,000	104,633,000	18,834,000	85,799,000	103,121,000	18,561,000	84,560,000
Laundry and Drycleaning Services	9,903,890	2,760,294	7,143,596	11,230,581	3,070,412	8,160,169	12,426,747	3,266,249	9,160,498
Recreation, Entertainment and Travel	246,286	13,420	232,866	274,074	25,307	248,767	255,870	29,288	226,582
Rental Services (Auto-Truck)	574,150	21,766	552,384	892,855	126,401	766,454	1,003,872	113,916	889,956
Rental Services (Equipment)	3,734,747	2,009,698	1,365,049	3,859,188	2,211,105	1,648,083	4,308,556	2,436,369	1,872,187
Retailing (Non-Food)	346,639	93,331	253,308	492,191	160,280	331,911	538,537	156,817	381,720
Retailing (Food Other Than Convenience Stores)	10,257,176	4,242,023	6,015,153	11,416,785	4,289,839	7,126,946	13,242,852	4,698,439	8,544,413
Soft Drink Bottlers $\frac{1}{4}$ $\frac{3}{4}$ $\frac{4}{4}$	7,865,667	1,995,073	5,870,594	7,869,664	2,126,985	5,742,679	8,595,540	2,203,574	6,391,966
Miscellaneous	14,674,000	1,027,000	13,647,000	15,101,000	1,057,000	14,044,000	16,200,000	1,296,000	14,904,000
	488,218	73,309	414,909	605,748	60,312	545,436	688,365	116,818	571,547

See Footnotes on TABLE 1.

TABLE 9

NUMBER OF ESTABLISHMENTS - 1969-1971

Kinds of Franchised Business	1969		1970		1971	
	Total	Company-Owned	Total	Company-Owned	Total	Company-Owned
TOTAL - ALL FRANCHISING	383,908	68,863	396,314	71,934	431,169	74,721
Automobile and Truck Dealers ^{1/}	37,800	378	37,200	372	32,870	301
Automotive Products and Services	18,910	4,417	20,449	4,816	34,468	4,278
Business Aids and Services	8,645	3,083	10,487	3,839	14,745	3,997
Accounting, Credit, Collection Agencies and General Business Services	935	25	1,145	47	1,542	32
Employment Services	2,520	1,150	2,927	1,302	3,076	850
Printing and Copying Services	251	44	329	45	473	50
Tax Preparation Services	3,710	1,847	4,708	2,395	5,950	3,028
Miscellaneous Business Services	1,229	17	1,378	50	3,704	39
Construction, Home Improvement, Maintenance and Cleaning Services	558	73	685	79	8,476	177
Convenience Stores	8,219	4,903	8,843	5,082	8,945	5,209
Educational Products and Services	4,457	318	4,910	396	1,353	407
Restaurants (All Types)	28,736	3,842	32,584	4,906	27,678	5,496
Gasoline Service Stations ^{1/}	222,200	44,400	222,000	44,400	220,000	44,000
Hotels and Motels	3,151	727	3,399	876	3,990	996
Campgrounds	N.A.	N.A.	N.A.	N.A.	848	26
Laundry and Drycleaning Services	3,962	210	4,113	224	3,715	210
Recreation, Entertainment and Travel	2,513	34	2,667	37	1,961	47
Rental Services (Auto-Truck); Rental Services (Equipment)	9,087	1,502	10,742	1,689	7,967	1,495
Retailing (Non-Food)	28,954	4,681	30,698	4,859	1,229	246
Retailing (Food Other Than Convenience Stores)	N.A.	N.A.	N.A.	N.A.	44,848	6,661
Soft Drink Bottlers ^{1/ 3/}	2,700	100	2,700	100	10,378	1,014
Miscellaneous	4,016	195	4,837	259	2,750	100
					2,187	59

See Footnotes on TABLE 1.

N.A. - Not Available

TABLE 10

NUMBER OF ESTABLISHMENTS - 1972-1974

Kinds of Franchised Business	1972			1973			1974		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING	451,740	78,831	372,909	453,832	78,850	374,982	440,701	78,680	362,021
Automobile and Truck Dealers $\frac{1}{2}$	32,891	301	32,590	32,855	301	32,554	32,394	300	32,094
Automotive Products and Services	40,853	4,618	36,235	43,377	4,941	38,436	47,801	5,048	42,753
Business Aids and Services	16,617	4,692	11,925	16,950	4,011	12,939	19,516	4,203	15,313
Accounting, Credit, Collection Agencies and General Business Services	1,705	89	1,616	2,013	67	1,946	2,772	60	2,712
Employment Services	2,717	718	1,999	2,776	641	2,135	2,625	546	2,079
Printing and Copying Services	810	67	743	943	67	876	1,069	89	980
Tax Preparation Services	7,449	3,782	3,667	6,866	3,142	3,724	7,272	3,396	3,876
Miscellaneous Business Services	3,936	56	3,880	4,352	94	4,258	5,778	112	5,666
Construction, Home Improvement, Maintenance and Cleaning Services	9,877	185	9,692	11,411	232	11,179	12,546	241	12,305
Convenience Stores	10,546	6,539	4,007	11,501	7,161	4,340	12,851	8,202	4,649
Educational Products and Services	1,386	323	1,063	1,191	227	964	1,117	233	884
Restaurants (All Types)	32,538	6,319	26,219	36,340	8,316	28,024	39,796	10,115	29,681
Gasoline Service Stations $\frac{1}{2}$	226,459	45,292	181,167	215,880	43,176	172,704	196,130	39,226	156,904
Hotels and Motels	4,227	904	3,323	5,038	1,198	3,840	5,441	1,105	4,336
Campgrounds	950	32	918	1,082	38	1,044	1,063	23	1,040
Laundry and Drycleaning Services	3,506	180	3,326	3,623	141	3,482	3,652	108	3,544
Recreation, Entertainment and Travel	2,884	59	2,825	2,944	65	2,879	2,852	72	2,780
Rental Services (Auto-Truck)	8,314	1,564	6,750	7,963	1,816	6,147	6,089	1,363	4,726
Rental Services (Equipment)	1,077	192	885	1,466	138	1,328	1,404	146	1,258
Retailing (Non-Food)	43,334	6,304	37,030	45,294	5,881	39,413	41,417	6,847	34,570
Retailing (Food Other Than Convenience Stores)	11,211	1,125	10,086	11,347	961	10,386	11,858	1,199	10,659
Soft Drink Bottlers $\frac{1}{2}$ $\frac{3}{4}$	2,750	100	2,650	2,680	100	2,580	2,450	85	2,365
Miscellaneous	2,320	102	2,218	2,690	147	2,543	2,524	164	2,360

See Footnotes on TABLE 1.

TABLE 11

NUMBER OF ESTABLISHMENTS - 1975-1977

Kind of Franchised Business	1975			1976			1977		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING $\frac{4}{1}$	434,538	80,561	353,977	443,263	83,229	360,034	452,508	85,958	366,552
Automobile and Truck Dealers $\frac{1}{4}$	31,846	300	31,546	31,860	300	31,560	33,373	300	33,073
Automotive Products and Services	47,454	5,004	42,450	48,026	4,763	43,263	48,718	4,834	44,084
Business Aids and Services	22,159	4,635	17,524	25,122	5,042	20,080	32,227	5,528	26,698
Accounting, Credit, Collection Agencies and General Business Services	3,543	59	3,483	3,633	61	3,572	3,749	57	3,692
Employment Services	2,721	623	2,098	3,061	758	2,303	3,410	904	2,506
Printing and Copying Services	1,141	96	1,045	1,486	131	1,355	1,927	130	1,797
Tax Preparation Services	7,547	3,710	3,837	7,984	3,903	4,081	8,438	4,192	4,246
Real Estate	3,808	21	3,787	5,986	70	5,916	11,449	114	11,335
Miscellaneous Business Services	3,394	126	3,268	2,962	119	2,843	3,254	132	3,122
Construction, Home Improvement, Maintenance and Cleaning Services	10,821	236	10,585	12,083	344	11,739	13,093	373	12,720
Convenience Stores	13,513	8,599	4,914	13,584	9,117	4,467	14,144	9,395	4,749
Educational Products and Services	1,304	304	1,000	1,222	266	956	1,878	323	1,555
Restaurants (All Types)	42,983	11,685	31,298	46,898	12,562	34,336	51,972	14,527	37,445
Gasoline Service Stations $\frac{1}{1}$	189,480	37,896	151,584	186,840	37,368	149,472	176,465	35,305	141,160
Hotels and Motels	5,413	1,110	4,303	5,269	1,015	4,254	5,186	995	4,191
Campgrounds	1,014	27	987	1,099	20	1,079	1,057	19	1,038
Laundry and Drycleaning Services	3,170	136	3,034	2,922	125	2,797	2,769	67	2,702
Recreation, Entertainment and Travel	3,410	61	3,349	3,772	70	3,702	4,242	73	4,169
Rental Services (Auto-Truck)	6,490	1,855	4,635	6,500	1,741	4,759	6,888	1,843	5,045
Rental Services (Equipment)	1,436	123	1,313	1,521	172	1,349	1,421	156	1,265
Retailing (Non-Food)	37,179	7,792	29,387	39,212	9,162	30,050	41,760	11,142	30,618
Retailing (Food Other Than Convenience Stores)	11,761	536	11,223	12,742	805	11,937	13,299	904	12,395
Soft Drink Bottlers $\frac{1}{3}$	2,398	85	2,313	2,246	76	2,170	2,146	70	2,076
Miscellaneous	2,707	175	2,532	2,345	281	2,064	1,870	301	1,569

See Footnotes on TABLE 1.

TABLE 12

NUMBER OF ESTABLISHMENTS - 1973-1980

Kinds of Franchised Business	Total	1978 Company- Owned	Franchisee- Owned	Total	1979 Company- Owned	Franchisee- Owned	Total	1980 Company- Owned	Franchisee- Owned
TOTAL - ALL FRANCHISING 4/	453, 590	84, 817	368, 773	452, 487	85, 200	367, 207	442, 371	85, 475	356, 896
Automobile and Truck Dealers 1/ 4/	33, 500	250	33, 250	33, 045	200	32, 845	29, 433	150	29, 283
Automotive Products and Services 2/	47, 215	4, 576	42, 639	45, 089	4, 152	40, 937	40, 210	4, 221	35, 989
Business Aids and Services	38, 727	5, 606	33, 121	41, 013	5, 888	35, 125	40, 861	6, 317	34, 544
Accounting, Credit, Collection Agencies and General Business Services	3, 148	45	3, 103	2, 983	44	2, 939	2, 377	43	2, 334
Employment Services	3, 775	910	2, 865	4, 249	1, 119	3, 130	4, 408	1, 261	3, 147
Printing and Copying Services	2, 362	140	2, 222	2, 578	89	2, 489	2, 801	141	2, 660
Tax Preparation Services	8, 592	4, 225	4, 367	8, 730	4, 312	4, 418	9, 181	4, 363	4, 818
Real Estate 5/	16, 959	162	16, 797	18, 371	215	18, 156	17, 288	226	17, 072
Miscellaneous Business Services	3, 891	124	3, 767	4, 102	109	3, 993	4, 796	283	4, 513
Construction, Home Improvement, Maintenance and Cleaning Services	13, 300	492	12, 808	14, 101	562	13, 539	14, 308	588	13, 720
Convenience Stores	14, 125	3, 479	4, 646	14, 660	9, 839	4, 821	15, 614	9, 679	5, 935
Educational Products and Services	2, 313	458	1, 855	2, 697	508	2, 189	3, 243	555	2, 688
Restaurants (All Types)	55, 312	15, 510	39, 802	58, 936	16, 884	42, 052	59, 959	17, 826	42, 133
Gasoline Service Stations 1/ 4/	172, 300	32, 737	139, 563	164, 790	31, 310	133, 480	158, 540	28, 537	130, 003
Hotels and Motels	5, 220	986	4, 234	5, 339	981	4, 358			
Campgrounds	987	18	949	928	16	912	6, 422	966	5, 456
Laundry and Drycleaning Services	2, 678	53	2, 625	2, 692	56	2, 636	3, 429	47	3, 382
Recreation, Entertainment and Travel	4, 113	70	4, 043	4, 267	84	4, 183	4, 642	102	4, 540
Rental Services (Auto-Truck)	7, 202	1, 937	5, 265	7, 467	1, 884	5, 583	7, 298	2, 008	5, 290
Rental Services (Equipment)	1, 523	153	1, 370	1, 698	185	1, 513	2, 197	271	1, 926
Retailing (Non-Food)	36, 546	11, 265	25, 281	36, 785	11, 451	25, 334	35, 246	12, 558	22, 688
Retailing (Food Other Than Convenience Stores)	14, 733	969	13, 764	14, 525	1, 035	13, 490	15, 503	1, 234	14, 269
Soft Drink Bottlers 1/ 3/ 4/	2, 096	70	2, 026	1, 950	75	1, 875	1, 850	75	1, 775
Miscellaneous	1, 720	188	1, 532	2, 505	170	2, 335	3, 616	341	3, 275

See Footnotes on TABLE 1.

TABLE 13

NUMBER OF ESTABLISHMENTS - 1981-1983

Kinds of Franchised Business	1981			1982			1983		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING	442,418	85,905	356,513	442,413	86,827	355,586	441,181	85,789	355,392
Automobile and Truck Dealers <u>1/</u>	28,863	50	28,813	27,791	0	27,791	26,848	0	26,848
Automotive Products and Services <u>2/</u>	39,616	4,126	35,490	36,614	4,233	32,381	36,541	4,268	32,273
Business Aids and Services	45,835	6,712	39,123	46,498	7,004	39,494	46,359	6,372	39,987
Accounting, Credit, Collection Agencies and General Business Services	2,194	43	2,151	2,281	44	2,237	2,273	44	2,229
Employment Services	4,719	1,437	3,282	4,382	1,397	2,985	4,181	1,477	2,704
Printing and Copying Services	3,331	125	3,206	3,548	128	3,420	3,818	130	3,688
Tax Preparation Services	9,545	4,546	4,999	9,808	4,620	5,188	9,092	4,018	5,074
Real Estate	15,636	223	15,413	14,771	450	14,321	13,929	278	13,651
Miscellaneous Business Services	10,410	338	10,072	11,708	365	11,343	13,066	425	12,641
Construction, Home Improvement, Maintenance and Cleaning Services	14,732	702	14,030	15,958	623	15,335	17,512	636	16,876
Convenience Stores	15,524	9,356	6,168	15,818	9,517	6,301	14,683	8,446	6,237
Educational Products and Services	3,914	595	3,319	4,464	666	3,798	6,526	713	5,813
Restaurants (All Types)	61,846	19,355	42,491	64,176	20,017	44,159	67,528	21,785	45,743
Gasoline Service Stations <u>1/</u>	151,250	27,225	124,025	144,690	26,044	118,646	136,570	24,583	111,987
Hotels, Motels and Campgrounds	6,416	1,052	5,364	6,376	982	5,394	6,806	1,067	5,739
Laundry and Drycleaning Services	3,105	41	3,064	3,416	92	3,324	2,937	100	2,837
Recreation, Entertainment and Travel	5,625	89	5,536	6,198	126	6,072	6,515	107	6,408
Rental Services (Auto-Truck)	7,463	1,990	5,473	10,216	2,129	8,087	10,783	2,308	8,475
Rental Services (Equipment)	1,635	176	1,459	1,957	238	1,719	2,093	247	1,846
Retailing (Non-Food)	35,032	12,273	22,759	37,416	12,679	24,737	38,189	12,351	25,838
Retailing (Food Other Than Convenience Stores)	16,171	1,878	14,293	15,630	1,987	13,643	15,208	2,235	12,973
Soft Drink Bottlers <u>1/ 3/</u>	1,750	75	1,675	1,626	75	1,551	1,568	85	1,483
Miscellaneous	3,641	210	3,431	3,569	415	3,154	4,515	486	4,029

See Footnotes on TABLE 1.

TABLE 14

TOTAL SALES OF PRODUCTS AND SERVICES BY FRANCHISORS TO FRANCHISEES - 1984
(Thousands of Dollars)

Kinds of Franchised Business	Total	Merchandise (non-food) for resale)	Supplies (such as paper goods, etc.)	Food ingredients	Other
<u>TOTAL - ALL FRANCHISING 1/</u>					
Automotive Products and Services	6,752,959	4,520,906	305,391	1,798,983	127,679
Business Aids and Services	1,899,308	1,882,200	16,138	0	970
Construction, Home Improvement, Maintenance and Cleaning Services	72,372	32,810	11,001	0	28,561
Convenience Stores	127,149	102,614	14,433	0	10,102
Educational Products and Services	185,354	60	50	182,044	3,200
Restaurants (All Types)	41,475	1,148	2,669	37,400	258
Hotels, Motels and Campgrounds	1,334,029	108,076	190,276	986,997	48,680
Laundry and Drycleaning Services	14,041	3,386	10,415	240	0
Recreation, Entertainment and Travel	4,671	0	21	0	4,650
Rental Services (Auto-Truck)	3,853	2,404	474	0	975
Rental Services (Equipment)	2,634	0	2,634	0	0
Retailing (Non-Food)	44,872	33,130	1,000	0	10,742
Retailing (Food Other Than Convenience Stores)	2,307,510	2,275,877	30,721	0	912
Miscellaneous	678,959	48,545	22,697	592,302	15,415
	36,732	30,656	2,862	0	3,214

1/ Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink bottlers for which data were not collected.

TABLE 15

TOTAL SALES OF PRODUCTS AND SERVICES BY FRANCHISORS TO FRANCHISEES - 1985 ^{1/}
(Thousands of Dollars)

<u>Kinds of Franchised Business</u>	<u>Total</u>	<u>Merchandise (non-food) for resale</u>	<u>Supplies (such as paper foods, etc.)</u>	<u>Food ingredients</u>	<u>Other</u>
TOTAL - ALL FRANCHISING ^{2/}	7,531,858	5,072,544	337,987	1,976,200	145,127
Automotive Products and Services	2,134,321	2,111,861	20,720	0	1,740
Business Aids and Services	96,151	44,272	16,041	0	35,838
Construction, Home Improvement, Maintenance and Cleaning Services	147,833	118,655	15,243	0	13,935
Convenience Stores	203,634	60	55	200,119	3,400
Educational Products and Services	48,700	1,445	3,180	43,750	325
Restaurants (All Types)	1,489,792	112,690	204,606	1,121,464	51,032
Hotels, Motels and Campgrounds	18,625	5,498	12,887	240	0
Laundry and Drycleaning Services	5,096	0	21	0	5,075
Recreation, Entertainment and Travel	4,130	2,505	625	0	1,000
Rental Services (Auto-Truck)	2,695	0	2,695	0	0
Rental Services (Equipment)	47,255	34,360	1,072	0	11,823
Retailing (Non-Food)	2,600,570	2,563,503	33,942	0	3,125
Retailing (Food Other Than Convenience Stores)	690,251	43,063	23,269	610,627	13,292
Miscellaneous	42,805	34,632	3,631	0	4,542

^{1/} Estimated by respondents.^{2/} Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers for which data were not collected.

TABLE 16

TOTAL SALES OF PRODUCTS AND SERVICES BY FRANCHISORS TO FRANCHISEES - 1986 ^{1/}
(Thousands of Dollars)

Kinds of Franchised Business	Total	Merchandise (non-food) for resale	Supplies (such as paper foods, etc.)	Food	
				ingredients	Other
TOTAL - ALL FRANCHISING ^{2/}					
Automotive Products and Services	8,373,546	5,625,562	388,663	2,180,083	179,238
Business Aids and Services	2,287,606	2,258,975	25,761	0	2,870
Construction, Home Improvement, Maintenance and Cleaning Services	133,691	59,801	28,036	0	45,854
Convenience Stores	170,375	136,083	17,457	0	16,835
Educational Products and Services	223,716	65	60	219,991	3,600
Restaurants (All Types)	55,529	2,021	3,770	49,150	588
Hotels, Motels and Campgrounds	1,638,821	122,819	219,259	1,237,197	59,546
Laundry and Drycleaning Services	21,214	6,516	14,458	240	0
Recreation, Entertainment and Travel	5,522	0	22	0	5,500
Rental Services (Auto-Truck)	4,482	2,702	780	0	1,000
Rental Services (Equipment)	3,213	0	3,213	0	0
Retailing (Non-Food)	50,916	36,860	1,177	0	12,879
Retailing (Food Other Than Convenience Stores)	2,960,792	2,908,643	45,189	0	6,960
Miscellaneous	764,857	49,367	24,591	673,505	17,394
	52,812	41,710	4,890	0	6,212

^{1/} Estimated by respondents.^{2/} Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers for which data were not collected.

TABLE 17

AVERAGE SALES PER ESTABLISHMENT - 1984-1986
(Thousands of Dollars)

Kinds of Franchised Business	1984			1985*			1986*		
	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned	Total	Company-Owned	Franchisee-Owned
TOTAL - ALL FRANCHISING	1,108	731	1,199	1,167	769	1,263	1,203	813	1,295
Automobile and Truck Dealers ^{1/}	9,293	0	9,293	10,165	0	10,165	11,064	0	11,064
Automotive Products and Services ^{2/}	261	653	206	279	700	218	297	738	233
Business Aids and Services	207	305	191	222	333	206	231	366	213
Accounting, Credit, Collection Agencies and General Business Systems	72	325	67	70	406	66	73	428	68
Employment Services	566	727	480	608	775	521	630	823	535
Printing and Copying Services	175	192	174	180	206	179	187	218	186
Tax Preparation Services	51	61	43	53	64	45	55	66	46
Real Estate ^{3/}	285	271	286	300	333	299	310	549	307
Miscellaneous Business Services	150	767	123	169	776	143	176	774	149
Construction, Home Improvement, Maintenance and Cleaning Services	185	1,713	124	197	1,777	133	199	1,709	139
Convenience Stores	688	741	618	713	760	648	767	840	670
Educational Products and Services	94	219	81	93	226	80	94	230	81
Restaurants (All Types)	616	714	569	633	740	581	649	762	595
Gasoline Service Stations ^{1/}	765	765	765	807	807	807	847	847	847
Hotels, Motels, and Campgrounds	1,884	3,963	1,527	1,867	4,034	1,510	1,848	3,939	1,504
Laundry and Drycleaning Services	102	221	95	110	243	102	119	257	110
Recreation, Entertainment and Travel	164	176	167	281	171	196	327	178	235
Rental Services (Auto-Truck)	441	1,242	232	463	1,334	242	498	1,482	258
Rental Services (Equipment)	275	462	229	277	476	227	275	467	228
Retailing (Non-Food)	388	425	373	407	466	383	430	523	396
Retailing (Food Other Than Convenience Stores)	532	893	469	515	893	452	492	926	424
Soft Drink Bottlers ^{1/} ^{3/}	11,001	14,063	10,797	13,012	13,790	12,949	15,000	13,565	15,139
Miscellaneous	165	234	155	166	300	157	168	290	159

* Estimated by respondents.

See Footnotes on TABLE 1.

TABLE 18

MINORITY OWNERSHIP: 1984 1/
NUMBER OF ESTABLISHMENTS

Kinds of Franchised Business	Minority Groups				
	Total	Black	Spanish Surname	American-Indian	Oriental
TOTAL - ALL FRANCHISING	8,116	2,901	2,641	130	2,444
Automotive Products and Services	1,380	795	411	28	146
Business Aids and Services	940	272	511	40	117
Construction, Home Improvement, Maintenance and Cleaning Services	651	325	228	23	75
Convenience Stores	831	138	133	5	555
Educational Products and Services	72	15	30	0	27
Restaurants (All Types)	1,954	644	648	13	649
Hotels, Motels and Campgrounds	301	6	11	1	283
Laundry and Drycleaning Services	100	50	24	0	26
Recreation, Entertainment and Travel	125	50	58	2	15
Rental Services (Auto-Truck)	95	44	42	2	7
Rental Services (Equipment)	16	4	10	0	2
Retailing (Non-Food)	562	137	186	9	230
Retailing (Food Other Than Convenience Stores)	1,042	414	320	4	304
Miscellaneous	47	7	29	3	8

1/ Of the 1,942 franchisors, 567 reported minority ownership 1,288 had no minority ownership and 87 franchisors with 60,333 franchisee-owned units were not able to respond since they do not maintain such records.

2/ Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers, for which data were not collected.

TABLE 19

INTERNATIONAL FRANCHISING: 1984 ^{1/}
LOCATION OF ESTABLISHMENTS

Kinds of Franchised Business ^{2/}	Total	Location								Other ^{3/}
		Canada	Mexico	Caribbean	United Kingdom	Europe	Australia	Japan	Asia	
TOTAL - ALL FRANCHISING	27,021	8,101	507	809	2,456	4,427	2,269	5,659	1,205	1,588
Business Aids and Services	2,763	1,012	10	35	388	472	360	276	84	126
Construction, Home Improvement, Maintenance and Cleaning Services	1,478	585	1	27	189	183	14	417	27	35
Restaurants (All Types)	5,716	1,591	119	290	576	514	581	1,490	157	398
Hotels, Motels and Campgrounds	578	300	36	23	25	100	12	8	31	43
Recreation, Entertainment and Travel	165	62	0	6	5	19	25	30	0	18
Rental Services (Auto-Truck)	5,828	694	215	256	358	1,994	592	512	423	784
Laundry and Drycleaning Services	273	267	0	5	1	0	0	0	0	0
Automotive Products and Services	1,919	872	14	61	94	386	129	135	116	112
Retailing (Non-Food)	3,300	1,477	59	10	403	612	435	180	80	44
Educational Products and Services, Rental Services (Equipment), Convenience Stores, and Miscellaneous	3,851	732	47	8	377	104	101	2,265	204	13
Retailing (Food Other Than Convenience Stores)	1,150	509	6	88	40	43	20	346	83	15

^{1/} Represents 328 Franchisors.

^{2/} Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers, for which data were not collected.

^{3/} Includes South America 423, Africa 623, New Zealand 383, and Central America 159.

TABLE 20

TYPES OF CHANGES IN OWNERSHIP: 1984 ^{1/}

Kinds of Franchised Business ^{2/}	Total	Establishments		Establishments Discontinued
		Repurchased for Company Ownership	Converted to Franchisee Ownership	Company- Owned
TOTAL - ALL FRANCHISING	9,447	577	953	1,030
Automotive Products and Services	1,216	31	123	55
Business Aids and Services ¹	1,915	42	183	1,007
Construction, Home Improvement, Maintenance and Cleaning Services	634	19		49
Convenience Stores	373	31	9	1,641
Educational Products and Services	315	0	25	8
Restaurants (All Types)	1,997	328	2	157
Hotels, Motels and Campgrounds	456	1	339	49
Laundry and Drycleaning Services	118	2	87	306
Recreation, Entertainment and Travel	127	2	0	41
Rental Services (Auto-Truck)	232	4	5	3
Rental Services (Equipment)	84	10	11	2
Retailing (Non-Food)	1,428	87	0	21
Retailing (Food Other Than Convenience Stores)	458	18	101	6
Miscellaneous	94	2	60	267
			8	38
				28
				56

^{1/} Of the 1,942 Franchisors, 898 reported changes in ownership, 1,044 had no changes.^{2/} Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers, for which data were not collected.

TABLE 21

EMPLOYMENT: 1984 ^{1/}

<u>Kinds of Franchised Businesses</u>	<u>Total</u>	<u>Company- Owned Outlets</u>	<u>Franchisee- Owned Outlets</u>
TOTAL - ALL FRANCHISING	5,671,922	N.A.	N.A.
Automobile and Truck Dealers ^{2/}	843,900	N.A.	N.A.
Automotive Products and Services	165,986	32,527	133,459
Business Aids and Services	496,249	164,197	332,052
Accounting, Credit, Collection Agencies and General Business Services	6,609	499	6,110
Employment Services	190,354	105,262	85,092
Printing and Copying Services	15,242	498	14,744
Tax Preparation Services	64,591	35,539	29,052
Real Estate	155,698	4,944	150,754
Miscellaneous Business Services	63,755	17,455	46,300
Construction, Home Improvement, Maintenance and Cleaning Services	97,879	13,728	84,151
Convenience Stores	137,103	82,976	54,127
Educational Products and Services	36,686	11,708	24,978
Restaurants (All Types)	2,182,143	864,118	1,318,025
Gasoline Service Stations ^{2/}	581,000	N.A.	N.A.
Hotels, Motels and Campgrounds	476,730	125,022	351,708
Laundry and Drycleaning Services	9,111	1,065	8,046
Recreation, Entertainment and Travel	24,486	3,017	21,469
Rental Services (Auto-Truck)	62,203	31,437	30,766
Rental Services (Equipment)	12,297	3,647	8,650
Retailing (Non-Food)	199,520	61,634	137,886
Retailing (Food Other Than Convenience Stores)	181,636	34,034	147,602
Soft Drink Bottlers ^{2/}	128,900	N.A.	N.A.
Miscellaneous	36,093	4,298	31,795

^{1/} Includes part-time and working proprietors.^{2/} Bureau of Labor Statistics.

N.A. - Not Available

TABLE 22

RANKING OF KINDS OF FRANCHISING BY SALES: 1984

<u>Kinds of Franchised Business</u>	<u>Sales (\$000)</u>	<u>Number of Establishments</u>
TOTAL - ALL FRANCHISING	492,087,622	444,299
Automobile and Truck Dealers	252,063,000	27,125
Gasoline Service Stations	100,997,000	132,080
Restaurants (All Types)	43,433,782	70,495
Soft Drink Bottlers	16,700,000	1,518
Retailing (Non-Food)	15,527,699	39,970
Hotels, Motels and Campgrounds	13,159,020	6,984
Convenience Stores	10,292,508	14,960
Business Aids and Services	9,791,128	47,294
Automotive Products and Services	9,186,427	35,111
Retailing (Food Other Than Convenience Stores)	8,630,991	16,202
Rental Sales (Auto-Truck)	4,966,400	11,253
Construction, Home Improvement, Maintenance and Cleaning Services	3,121,764	16,862
Recreation, Entertainment and Travel	1,809,935	7,197
Educational Products and Services	684,419	7,286
Rental Services (Equipment)	639,206	2,324
Laundry and Drycleaning Services	286,062	2,801
Miscellaneous	798,281	4,837

See Footnotes on TABLE 1

TABLE 23

RANKING OF KINDS OF FRANCHISING BY NUMBER OF ESTABLISHMENTS: 1984

<u>Kinds of Franchised Business</u>	<u>Number of Establishments</u>	<u>Sales (\$000)</u>
TOTAL - ALL FRANCHISING	444,299	492,087,622
Gasoline Service Stations	132,080	100,997,000
Restaurants (All Types)	70,495	43,433,782
Business Aids and Services	47,294	9,791,128
Retailing (Non-Food)	39,970	15,527,699
Automotive Products and Services	35,111	9,186,427
Automobile and Truck Dealers	27,125	252,063,000
Construction, Home Improvement, Maintenance and Cleaning Services	16,862	3,121,764
Retailing (Food Other Than Convenience Stores)	16,202	8,630,991
Convenience Stores	14,960	10,292,508
Rental Services (Auto-Truck)	11,253	4,966,400
Educational Products and Services	7,286	684,419
Recreation, Entertainment and Travel	7,197	1,809,935
Hotels, Motels and Campgrounds	6,984	13,159,020
Laundry and Drycleaning Services	2,801	286,062
Rental Services (Equipment)	2,324	639,206
Soft Drink Bottlers	1,518	16,700,000
Miscellaneous	4,837	798,281

See Footnotes on TABLE 1.

TABLE 24
PERCENT OF TOTAL SALES AND ESTABLISHMENTS
ACCOUNTED FOR BY FRANCHISORS AND FRANCHISEES - 1984

Kinds of Franchised Business	Percent of Total Sales		Percent of Total Establishments	
	Franchisor	Franchisee	Franchisor	Franchisee
Average for all Categories	12.9	87.1	19.6	80.4
Automobile and Truck Dealers	0.0	100.0	0.0	100.0
Automotive Products and Services	31.0	69.0	12.4	87.6
Business Aids and Services	20.0	80.0	13.5	86.5
Construction, Home Improvement, Maintenance and Cleaning Services	35.3	64.7	3.8	96.2
Convenience Stores	61.3	38.7	56.9	43.1
Educational Products and Services	22.5	77.5	9.6	90.4
Restaurants (All Types)	37.7	62.3	32.6	67.4
Gasoline Service Stations	18.0	82.0	18.0	82.0
Hotels, Motels and Campgrounds	30.9	69.1	14.7	85.3
Laundry and Drycleaning Services	12.6	87.4	5.8	94.2
Recreation, Entertainment and Travel	37.1	62.9	5.3	94.7
Rental Services (Auto-Truck)	58.3	41.7	20.7	79.3
Rental Services (Equipment)	33.3	66.7	19.8	80.2
Retailing (Non-Food)	33.5	66.5	30.6	69.4
Retailing (Food Other Than Convenience Stores)	25.0	75.0	14.9	85.1
Soft Drink Bottlers	8.0	92.0	6.3	93.7
Miscellaneous	15.8	84.2	10.6	89.4

TABLE 25

TOTAL INVESTMENT AND START UP CASH REQUIRED: 1984 ^{1/}
(Thousands of Dollars)

Kind of Franchised Business ^{2/}	Number of Firms	Number Reporting	Total Investment			Franchisee-Owned			Start Up Cash Franchisee-Owned		
			Lowest	Highest	Median	Lowest	Highest	Median	Lowest	Highest	Median
Automotive Products and Services	151	104	8	550	75	5	550	84	3	100	35
Business Aids and Services											
Accounting, Credit, Collection Agencies and General Business Systems	20	13	3	300	60	3	85	35	3	35	10
Employment Services	73	45	25	500	60	5	200	60	5	100	25
Printing and Copying Services	25	20	65	200	105	42	220	80	10	60	30
Tax Preparation Services	9	6	3	8	5	3	9	5	1	5	3
Real Estate	42	26	0	0	0	3	100	15	2	25	5
Miscellaneous Business Services	207	140	3	635	60	3	630	38	1	300	15
Construction, Home Improvement, Maintenance and Cleaning Services	176	107	4	680	40	4	200	40	1	50	10
Convenience Stores	24	16	75	526	125	50	526	100	8	75	30
Educational Products and Services	71	44	10	500	75	10	200	50	4	100	25
Restaurants (All Types)	465	282	20	2,000	350	16	2,000	250	5	700	100
Hotels, Motels and Campgrounds	42	26	400	10,000	1,500	238	10,000	1,500	100	600	250
Laundry and Drycleaning Services	17	11	125	250	195	50	150	102	10	75	30
Recreation, Entertainment and Travel	39	23	40	3,500	120	20	750	90	5	300	25
Rental Services (Auto-Truck)	28	18	50	350	200	10	600	150	6	150	75
Rental Services (Equipment)	28	21	50	500	150	50	400	100	18	125	45
Retailing (Non-Food)	291	182	12	600	120	10	600	100	2	200	50
Retailing (Food Other Than Convenience Stores)	166	106	15	800	80	10	900	100	3	180	30
Miscellaneous	68	43	20	850	40	10	750	100	5	150	30

^{1/} Investment and start up cash represent averages reported by respondents.^{2/} Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers for which data were not collected.

TABLE 26

FRANCHISE AGREEMENTS ISSUED IN 1984

Kinds of Franchised Business ^{1/}	Number of Firms	Firms That Issued Agreements	Term of Agreement (Number of Years)					Perpetual	Others ^{2/}
			1	3	5	10	15	20	25
TOTAL - ALL FRANCHISING	1,942	1,374	27	34	205	407	160	297	20
Automotive Products and Services	151	109	4	2	10	40	19	15	0
Business Aids and Services									
Accounting, Credit, Collection Agencies and General Business Services	20	15	2	0	3	4	2	0	0
Employment Services	73	48	0	0	13	14	1	4	1
Printing and Copying Services	25	20	0	0	3	3	1	9	4
Tax Preparation Services	9	8	0	1	3	1	0	0	0
Real Estate	42	28	2	4	16	3	0	1	0
Miscellaneous Business Services	207	146	4	6	39	44	9	7	2
Construction, Home Improvement, Maintenance and Cleaning Services	176	121	3	7	28	27	12	15	0
Convenience Stores	24	13	1	2	1	4	3	1	1
Educational Products and Services	71	50	0	0	9	17	4	8	0
Restaurants (All Types)	465	317	2	0	9	67	61	138	10
Hotels, Motels and Campgrounds	42	31	0	0	4	3	1	22	0
Laundry and Drycleaning Services	17	13	0	1	2	4	1	1	0
Recreation, Entertainment and Travel	39	32	0	1	6	8	1	6	0
Rental Services (Auto-Truck)	28	20	0	2	5	2	0	1	0
Rental Services (Equipment)	28	21	2	1	4	11	1	1	0
Retailing (Non-Food)	291	218	6	4	32	82	27	39	2
Retailing (Food Other Than Convenience Stores)	166	115	1	2	15	52	6	23	0
Miscellaneous	68	49	0	1	3	21	11	6	0

^{1/} Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers, for which data were not collected.^{2/} Includes 7 for 7 years, 14 for 30 years and 15 for varying terms.

TABLE 27

RENEWALS AND TERMINATIONS - 1984

Kinds of Franchised Business	Eligible for Renewal	Not Renewed			Terminations			Reason for Termination		
		By Franchisor	By Franchisee	Mutual Agreement	By Franchisor	By Franchisee	Mutual Agreement	Non-Payment Financial Default	Quality Control Violations	Other
TOTAL - ALL FRANCHISING	15,354	515	547	342	2,649	3,661	305	1,419	270	960
Automotive Products and Services	1,262	6	37	34	259	727	22	124	0	135
Business Aids and Services										
Accounting, Credit, Collection Agencies and General Business Services	205	0	37	2	14	32	26	4	0	10
Employment	80	1	0	3	25	101	23	22	2	1
Printing and Copying Services	54	0	12	0	47	31	0	37	0	10
Tax Preparation Services	667	0	3	5	35	31	0	13	0	22
Real Estate	1,457	43	88	124	236	220	101	130	58	48
Miscellaneous Business Services	249	5	32	12	175	575	12	110	26	39
Construction, Home Improvement, Maintenance and Cleaning Services	1,522	352	12	12	451	248	1	270	3	158
Convenience Stores	313	1	2	4	28	37	0	13	0	15
Educational Products and Services	78	4	7	10	78	184	0	36	0	42
Restaurants (All Types)	842	39	58	33	508	485	5	269	36	203
Hotels, Motels and Campgrounds	228	10	16	6	264	67	8	74	135	55
Laundry and Drycleaning Services	557	0	153	2	16	60	0	15	0	1
Recreation, Entertainment and Travel	95	1	8	9	24	76	10	20	0	4
Rental Services (Auto-Truck)	230	0	0	1	51	43	0	35	0	16
Rental Services (Equipment)	132	5	7	8	30	35	5	26	0	4
Retailing (Non-Food)	6,843	28	48	57	311	500	75	155	6	150
Retailing (Other Than Convenience Stores)	539	20	27	20	102	172	17	59	0	43
Miscellaneous	1	0	0	0	15	27	0	7	4	4

NOTE: Of 2,628 franchises proposed to be transferred by franchisees, all but 139 were approved.

TABLE 28 FRANCHISING: SIZE DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984 ^{1/}
SUMMARY

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	1,942	283,576	100.0	122,327,622	100.0
1001 and Greater	54	141,796	50.0	60,574,840	49.5
501 - 1000	63	41,854	14.8	19,057,802	15.6
151 - 500	198	53,454	18.8	21,865,153	17.9
51 - 150	305	25,955	9.1	11,604,845	9.5
11 - 50	687	17,216	6.1	8,107,876	6.6
0 - 10	635	3,301	1.2	1,117,106	0.9

^{1/} Size group distribution not available for Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers.

TABLE 29

AUTOMOBILE AND TRUCK DEALERS

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	27,125	27,250	27,340	0.5	0.3
Company-owned	0	0	0	0.0	0.0
Franchisee-owned	27,125	27,250	27,340	0.5	0.3
Total sales of products and services: (\$000)	252,063,000	277,018,000	302,498,000	9.9	9.2
Company-owned	0	0	0	0.0	0.0
Franchisee-owned	252,063,000	277,018,000	302,498,000	9.9	9.2
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	N.A.	N.A.	N.A.		
Supplies (such as paper goods, etc.)	N.A.	N.A.	N.A.		
Food ingredients	N.A.	N.A.	N.A.		
Other	N.A.	N.A.	N.A.		
Total	N.A.	N.A.	N.A.		

^{1/} Estimated by ITA on Bureau of the Census and trade association data.

N.A. - Not Available.

AUTOMOBILE AND TRUCK DEALERS
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total					
1001 and Greater					
501 - 1000					
151 - 500					
51 - 150					
11 - 50					
0 - 10					

INFORMATION NOT AVAILABLE

TABLE 30

AUTOMOTIVE PRODUCTS AND SERVICES ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	35,111	36,200	38,191	3.1	5.5
Company-owned	4,350	4,572	4,832	5.1	5.7
Franchisee-owned	30,761	31,628	33,359	2.8	5.5
Total sales of products and services: (\$000) ^{3/}	9,186,427	10,098,842	11,334,038	9.9	12.2
Company-owned ^{3/}	2,843,936	3,199,823	3,569,178	12.5	11.5
Franchisee-owned ^{3/}	6,342,491	6,899,019	7,764,860	8.8	12.6
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	1,882,200	2,111,861	2,258,975	12.2	7.0
Supplies (such as paper goods, etc.)	16,138	20,720	25,761	28.4	24.3
Food ingredients	0	0	0	0.0	0.0
Other	970	1,740	2,870	79.4	64.9
Total	1,899,308	2,134,321	2,287,606	12.4	7.2

^{1/} Includes Tire, Battery and Accessory Stores; Auto and Truck Wash Services; Brake and Muffler Repair and other Services.

^{2/} Data estimated by respondents.

^{3/} Includes sales of Non-Automotive Products such as Household Appliances, Garden Supplies, etc.

TABLE 31

AUTOMOTIVE PRODUCTS AND SERVICES ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	151	35,111	100.0	9,186,427	100.0
1001 and Greater	9	24,353	69.4	6,076,587	66.2
501 - 1000	5	3,172	9.0	1,161,295	12.6
151 - 500	13	4,004	11.4	955,680	10.4
51 - 150	23	2,106	6.0	575,809	6.3
11 - 50	50	1,225	3.5	348,335	3.8
0 - 10	51	251	0.7	68,721	0.7

^{1/} Includes Tire, Battery and Accessory Stores; Auto and Truck Wash Services; and Brake and Muffler Repair and Services and some establishments with significant sales of Non-Automotive Products such as Household Appliances, Garden Supplies, etc.

TABLE 32 ACCOUNTING, CREDIT, COLLECTION AGENCIES AND GENERAL BUSINESS SYSTEMS

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	2,255	2,366	2,648	4.9	11.9
Company-owned	38	32	33	-15.8	3.1
Franchisee-owned	2,217	2,334	2,615	5.3	12.0
Total sales of products and services: (\$000)	162,027	166,081	193,081	2.5	16.3
Company-owned	12,382	12,985	14,133	4.9	8.3
Franchisee-owned	149,645	153,096	178,948	2.3	16.9
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	608	666	740	9.5	11.1
Supplies (such as paper goods, etc.)	304	315	338	3.6	7.3
Food ingredients	0	0	0	0.0	0.0
Other	11,300	13,051	13,400	15.5	2.7
Total	12,212	14,032	14,478	14.9	3.2

^{1/} Data estimated by respondents.

TABLE 33 ACCOUNTING, CREDIT, COLLECTION AGENCIES AND GENERAL BUSINESS SYSTEMS
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	20	2,255	100.0	162,027	100.0
1001 and Greater	0	0	0.0	0	0.0
501 - 1000	3	1,470	65.2	87,205	53.8
151 - 500					
51 - 150	7	609	27.0	56,580	34.9
11 - 50	4	147	6.5	15,572	9.6
0 - 10	6	29	1.3	2,670	1.7

TABLE 34 ACCOUNTING, CREDIT, COLLECTION AGENCIES AND GENERAL BUSINESS SYSTEMS ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	30	1	29	Kentucky	24	0	24	North Dakota	9	0	9
Alaska	4	0	4	Louisiana	30	2	28	Ohio	78	0	78
Arizona	33	0	33	Maine	9	0	9	Oklahoma	24	0	24
Arkansas	10	0	10	Maryland	50	1	49	Oregon	27	0	27
California	195	2	193	Massachusetts	50	3	47	Pennsylvania	89	1	88
Colorado	67	0	67	Michigan	31	0	31	Rhode Island	8	0	8
Connecticut	39	1	38	Minnesota	19	0	19	South Carolina	36	0	36
Delaware	14	0	14	Mississippi	13	1	12	South Dakota	4	0	4
District of Columbia	7	0	7	Missouri	45	1	44	Tennessee	34	2	32
Florida	123	4	119	Montana	14	0	14	Texas	150	0	150
Georgia	75	1	74	Nebraska	21	0	21	Utah	21	0	21
Hawaii	11	0	11	Nevada	13	0	13	Vermont	19	0	19
Idaho	16	0	16	New Hampshire	22	0	22	Virginia	89	0	89
Illinois	88	1	87	New Jersey	35	1	34	Washington	36	0	36
Indiana	43	0	43	New Mexico	9	0	9	West Virginia	15	0	15
Iowa	23	0	23	New York	70	3	67	Wisconsin	52	0	52
Kansas	32	0	32	North Carolina	65	0	65	Wyoming	9	0	9
								TOTAL	2,030	25	2,005

^{1/} Represents 90 percent of total establishments. The remaining 10 percent were unable to provide a geographic breakdown for this report.

TABLE 35

EMPLOYMENT SERVICES

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	4,444	4,755	5,218	7.0	9.7
Company-owned	1,548	1,637	1,731	5.7	5.7
Franchisee-owned	2,896	3,118	3,487	7.7	11.8
Total sales of products and services: (\$000)	2,513,827	2,893,633	3,291,784	15.1	13.8
Company-owned	1,124,633	1,268,509	1,425,283	12.8	12.4
Franchisee-owned	1,389,194	1,625,124	1,866,501	17.0	14.9
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	0	0	0	0.0	0.0
Supplies (such as paper goods, etc.)	1,354	1,317	1,407	- 2.7	6.8
Food ingredients	0	0	0	0.0	0.0
Other	0	0	0		
Total	1,354	1,317	1,407	- 2.7	6.8

^{1/} Data estimated by respondents.

TABLE 36

EMPLOYMENT SERVICES
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	73	4,444	100.0	2,513,827	100.0
1001 and Greater	0	0	0.0	0	0.0
501 - 1000	11	3,135	70.5	1,885,490	75.0
151 - 500					
51 - 150					
11 - 50	18	464	10.5	216,144	8.6
0 - 10	37	218	4.9	79,346	3.2

TABLE 37

EMPLOYMENT SERVICES 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	52	17	35	Kentucky	43	7	36	North Dakota	6	0	6
Alaska	4	1	3	Louisiana	70	17	53	Ohio	199	61	138
Arizona	53	17	36	Maine	9	1	8	Oklahoma	57	20	37
Arkansas	51	17	34	Maryland	71	32	39	Oregon	28	8	20
California	420	200	220	Massachusetts	111	57	54	Pennsylvania	186	55	131
Colorado	94	39	55	Michigan	151	42	109	Rhode Island	19	2	17
Connecticut	109	21	88	Minnesota	62	32	30	South Carolina	79	6	73
Delaware	13	6	7	Mississippi	24	11	13	South Dakota	12	3	9
District of Columbia	35	15	20	Missouri	97	29	68	Tennessee	100	23	77
Florida	332	134	198	Montana	5	0	5	Texas	324	120	204
Georgia	122	51	71	Nebraska	32	6	26	Utah	16	4	12
Hawaii	13	5	8	Nevada	19	1	18	Vermont	4	0	4
Idaho	14	2	12	New Hampshire	20	0	20	Virginia	84	24	60
Illinois	183	64	119	New Jersey	203	59	144	Washington	64	22	42
Indiana	82	18	64	New Mexico	25	0	25	West Virginia	8	2	6
Iowa	40	3	37	New York	252	107	145	Wisconsin	56	13	43
Kansas	35	4	31	North Carolina	121	14	107	Wyoming	5	1	4
TOTAL									4,214	1,393	2,821

1/ Represents 95 percent of total establishments. The remaining 5 percent were unable to provide a geographic breakdown for this report.

TABLE 38

PRINTING AND COPYING SERVICES

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	4,257	4,864	5,607	14.3	15.3
Company-owned	97	104	110	7.2	5.8
Franchisee-owned	4,160	4,760	5,497	14.4	15.5
Total sales of products and services: (\$000)	745,162	873,903	1,048,503	17.3	20.0
Company-owned	18,716	21,403	23,976	14.4	12.0
Franchisee-owned	726,446	852,500	1,024,527	17.4	20.2
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	247	316	375	27.9	18.7
Supplies (such as paper goods, etc.)	3,405	6,204	10,224	82.2	64.8
Food ingredients	0	0	0	0.0	0.0
Other	3,996	5,343	6,807	33.7	27.4
Total	7,648	11,863	17,406	55.1	46.7

^{1/} Data estimated by respondents.

TABLE 39

PRINTING AND COPYING SERVICES
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	25	4,257	100.0	745,162	100.0
1001 and Greater	0	0	0.0	0	0.0
501 - 1000	3	2,167	50.9	401,257	53.8
151 - 500	7	1,857	43.6	300,796	40.4
51 - 150	8	202	4.8	35,919	4.8
11 - 50	7	31	0.7	7,190	1.0
0 - 10					

TABLE 40

PRINTING AND COPYING SERVICES ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company-Owned	Franchisee-Owned	State	Total	Company-Owned	Franchisee-Owned	State	Total	Company-Owned	Franchisee-Owned
Alabama	34	0	34	Kentucky	27	0	27	North Dakota	0	0	0
Alaska	6	0	6	Louisiana	57	0	57	Ohio	243	2	241
Arizona	177	2	115	Maine	6	0	6	Oklahoma	62	0	62
Arkansas	20	0	20	Maryland	69	1	68	Oregon	30	0	30
California	584	6	578	Massachusetts	107	3	104	Pennsylvania	86	0	86
Colorado	108	0	108	Michigan	179	3	176	Rhode Island	21	1	20
Connecticut	43	3	40	Minnesota	74	19	55	South Carolina	34	0	34
Delaware	7	0	7	Mississippi	7	0	7	South Dakota	2	0	2
District of Columbia	4	0	4	Missouri	80	5	75	Tennessee	45	0	45
Florida	381	1	380	Montana	11	0	11	Texas	398	15	383
Georgia	145	3	142	Nebraska	15	4	11	Utah	31	0	31
Hawaii	9	0	9	Nevada	17	0	17	Vermont	3	0	3
Idaho	7	0	7	New Hampshire	12	0	12	Virginia	80	0	80
Illinois	215	0	215	New Jersey	133	1	132	Washington	61	0	61
Indiana	82	0	82	New Mexico	28	0	28	West Virginia	5	0	5
Iowa	22	2	20	New York	188	0	188	Wisconsin	82	7	75
Kansas	33	15	18	North Carolina	55	0	55	Wyoming	1	0	1
								TOTAL	4,066	93	3,973

^{1/} Represents 96 percent of total establishments. The remaining 4 percent were unable to provide a geographic breakdown for this report.

TABLE 41

TAX PREPARATION SERVICES

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	8,515	8,643	8,792	1.5	1.7
Company-owned	3,774	3,805	3,838	0.8	0.9
Franchisee-owned	4,741	4,838	4,954	2.0	2.4
Total sales of products and services: (\$000)	434,856	459,098	484,738	5.6	5.6
Company-owned	230,943	242,694	255,134	5.1	5.1
Franchisee-owned	203,913	216,404	229,604	6.1	6.1
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	0	0	0	0.0	0.0
Supplies (such as paper goods, etc.)	610	619	635	1.5	2.6
Food ingredients	0	0	0	0.0	0.0
Other	0	0	0	0.0	0.0
Total	610	619	635	1.5	2.6

^{1/} Data estimated by respondents.

TABLE 42

TAX PREPARATION SERVICES
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	9	8,515	100.0	434,856	100.0
1001 and Greater	4	8,382	98.4	429,920	98.9
501 - 1000					
151 - 500					
51 - 150					
11 - 50	5	133	1.6	4,936	1.1
0 - 10	0	0	0.0	0	0.0

TABLE 43

REAL ESTATE

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	12,950	13,803	15,010	6.6	8.7
Company-owned	311	263	169	-15.4	-35.7
Franchisee-owned	12,639	13,540	14,841	7.1	9.6
Total sales of products and services: (\$000) ^{2/}	3,696,859	4,138,535	4,646,060	11.9	12.3
Company-owned ^{2/}	84,571	87,515	92,820	3.5	6.1
Franchisee-owned ^{2/}	3,612,288	4,051,020	4,553,240	12.1	12.4
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	0	0	0	0.0	0.0
Supplies (such as paper goods, etc.)	2,555	2,864	2,822	12.1	- 1.5
Food ingredients	0	0	0	0.0	0.0
Other	0	0	0	0.0	0.0
Total	2,555	2,684	2,822	12.1	- 1.5

^{1/} Data estimated by respondents.^{2/} Gross commissions.

TABLE 44

REAL ESTATE
DISTRIBUTION BY NUMBER OF ESTABLISHMENT - 1984

Size Groups	Franchising Companies Number	Establishments		Sales ^{1/}	
		Number	Percent	(\$000)	Percent
Total	42	12,950	100.0	3,696,859	100.0
1001 and Greater	3	9,631	74.4	2,327,000	63.0
501 - 1000	5	2,308	17.8	1,091,578	29.5
151 - 500					
51 - 150	8	665	5.1	195,125	5.3
11 - 50	13	298	2.3	70,936	1.9
0 - 10	13	48	0.4	12,220	0.3

^{1/} Gross commissions.

TABLE 45

REAL ESTATE ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	107	0	107	Kentucky	102	0	102	North Dakota	59	0	59
Alaska	36	0	36	Louisiana	116	0	116	Ohio	320	20	300
Arizona	293	25	268	Maine	107	0	107	Oklahoma	237	30	207
Arkansas	166	0	166	Maryland	135	10	125	Oregon	131	0	131
California	1,832	21	1,811	Massachusetts	300	0	300	Pennsylvania	436	0	436
Colorado	225	20	205	Michigan	651	33	618	Rhode Island	40	0	40
Connecticut	201	0	201	Minnesota	211	0	211	South Carolina	187	0	187
Delaware	24	0	24	Mississippi	73	0	73	South Dakota	66	0	66
District of Columbia	8	5	3	Missouri	301	12	289	Tennessee	164	0	164
Florida	991	10	981	Montana	62	0	62	Texas	926	50	876
Georgia	318	0	318	Nebraska	103	0	103	Utah	98	0	98
Hawaii	36	0	36	Nevada	83	0	83	Vermont	57	0	57
Idaho	71	0	71	New Hampshire	118	0	118	Virginia	220	10	210
Illinois	656	1	655	New Jersey	338	1	337	Washington	244	0	244
Indiana	250	0	250	New Mexico	74	0	74	West Virginia	57	0	57
Iowa	191	0	191	New York	513	0	513	Wisconsin	318	1	317
Kansas	142	4	138	North Carolina	327	4	323	Wyoming	69	0	69
								TOTAL	12,790	257	12,533

^{1/} Represents 99 percent of total establishments. The remaining 1 percent were unable to provide a geographic breakdown for this report.

TABLE 46

MISCELLANEOUS BUSINESS SERVICES ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	14,873	16,508	19,360	11.0	17.3
Company-owned	630	699	835	11.0	19.5
Franchisee-owned	14,243	15,809	18,525	11.0	17.2
Total sales of products and services: (\$000)	2,238,397	2,798,541	3,401,541	25.0	21.5
Company-owned	483,033	542,956	646,047	12.4	19.0
Franchisee-owned	1,755,364	2,255,585	2,755,494	28.5	22.2
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	31,955	43,290	58,686	35.5	35.6
Supplies (such as paper goods, etc.)	2,773	4,722	12,610	70.3	167.0
Food ingredients	0	0	0	0.0	0.0
Other	13,265	17,444	25,647	31.5	47.0
Total	47,993	65,456	96,943	36.4	48.1

^{1/} Includes Computer Services, Business Consultants and Brokers, Security, Dentists, Insurance and others.

^{2/} Data estimated by respondents.

TABLE 47

MISCELLANEOUS BUSINESS SERVICES ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	207	14,873	100.0	2,238,397	100.0
1001 and Greater	}	4	50.5	192,600	8.6
501 - 1000					
151 - 500					
51 - 150					
11 - 50	73	1,718	11.5	650,824	29.1
0 - 10	89	440	3.0	101,913	4.5

^{1/} Includes Computer Services, Business Consultants and Brokers, Security, Dentists, Insurance and others.

TABLE 48

MISCELLANEOUS BUSINESS SERVICES ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	132	2	130	Kentucky	147	4	143	North Dakota	31	1	30
Alaska	26	0	26	Louisiana	150	4	146	Ohio	544	44	500
Arizona	277	18	259	Maine	31	2	29	Oklahoma	176	4	172
Arkansas	82	1	81	Maryland	163	12	151	Oregon	216	7	209
California	1,983	107	1,876	Massachusetts	300	16	284	Pennsylvania	383	18	365
Colorado	312	6	306	Michigan	276	15	261	Rhode Island	18	1	17
Connecticut	161	13	148	Minnesota	247	10	237	South Carolina	125	3	122
Delaware	28	0	28	Mississippi	64	1	63	South Dakota	36	0	36
District of Columbia	40	9	31	Missouri	202	4	198	Tennessee	175	7	168
Florida	558	27	531	Montana	27	0	27	Texas	988	45	943
Georgia	279	11	268	Nebraska	89	1	88	Utah	102	5	97
Hawaii	21	1	20	Nevada	64	2	62	Vermont	23	0	23
Idaho	46	1	45	New Hampshire	34	1	33	Virginia	162	17	145
Illinois	497	24	473	New Jersey	301	15	286	Washington	209	7	202
Indiana	228	4	224	New Mexico	112	1	111	West Virginia	50	9	41
Iowa	154	3	151	New York	545	44	501	Wisconsin	178	4	174
Kansas	107	0	107	North Carolina	220	5	215	Wyoming	27	0	27
								TOTAL	11,346	536	10,810

^{1/} Represents 76 percent of total establishments. The remaining 24 percent were unable to provide a geographic breakdown for this report.

TABLE 49
CONSTRUCTION, HOME IMPROVEMENT, MAINTENANCE AND CLEANING SERVICES ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	16,862	16,895	18,996	0.2	12.4
Company-owned	644	659	721	2.3	9.4
Franchisee-owned	16,218	16,236	18,275	0.1	12.6
Total sales of products and services: (\$000)	3,121,764	3,325,804	3,772,354	6.5	13.4
Company-owned	1,103,476	1,170,728	1,232,275	6.1	5.3
Franchisee-owned	2,018,288	2,155,076	2,540,079	6.8	17.9
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	102,614	118,655	136,083	15.6	14.7
Supplies (such as paper goods, etc.)	14,433	15,243	17,457	5.6	14.5
Food ingredients	0	0	0	0.0	0.0
Other	10,102	13,935	16,835	37.9	20.8
Total	127,149	147,833	170,375	16.3	15.2

^{1/} Includes Furniture Repair, Water Conditioning, Lawn Care, Sewer Cleaning, and Carpet Cleaning.

^{2/} Data estimated by respondents.

TABLE 50
CONSTRUCTION, HOME IMPROVEMENT, MAINTENANCE AND CLEANING SERVICES ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	176	16,862	100.0	3,121,764	100.0
1001 and Greater	9	8,009	47.5	794,556	25.4
501 - 1000					
151 - 500	17	4,347	25.8	898,051	28.8
51 - 150	30	2,638	15.7	446,515	14.3
11 - 50	64	1,592	9.4	873,043	28.0
0 - 10	56	276	1.6	109,599	3.5

^{1/} Includes Furniture Repair, Water Conditioning, Lawn Care, Sewer Cleaning and Carpet Cleaning.

TABLE 51 CONSTRUCTION, HOME IMPROVEMENT, MAINTENANCE AND CLEANING SERVICES 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	155	1	154	Kentucky	94	3	91	North Dakota	88	2	86
Alaska	42	0	42	Louisiana	209	5	204	Ohio	606	46	560
Arizona	224	2	222	Maine	92	1	91	Oklahoma	217	5	212
Arkansas	111	4	107	Maryland	217	15	202	Oregon	261	3	258
California	1,564	74	1,490	Massachusetts	225	8	217	Pennsylvania	514	13	501
Colorado	261	10	251	Michigan	354	28	326	Rhode Island	52	0	52
Connecticut	188	5	183	Minnesota	323	3	320	South Carolina	162	2	160
Delaware	64	3	61	Mississippi	105	12	93	South Dakota	91	1	90
District of Columbia	33	4	29	Missouri	229	2	227	Tennessee	248	3	245
Florida	571	27	544	Montana	85	0	85	Texas	913	24	889
Georgia	324	25	299	Nebraska	127	8	119	Utah	134	0	134
Hawaii	46	1	45	Nevada	69	0	69	Vermont	70	3	67
Idaho	96	3	93	New Hampshire	69	1	68	Virginia	314	19	295
Illinois	590	41	549	New Jersey	369	26	343	Washington	355	5	350
Indiana	413	36	377	New Mexico	101	1	100	West Virginia	98	0	98
Iowa	231	1	230	New York	466	12	454	Wisconsin	301	8	293
Kansas	124	3	121	North Carolina	254	3	251	Wyoming	60	0	60
								TOTAL	12,909	502	12,407

1/ Represents 77 percent of total establishments. The remaining 23 percent were unable to provide a geographic breakdown for this report.

TABLE 52

CONVENIENCE STORES

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	14,960	15,314	16,120	2.4	5.3
Company-owned	8,507	8,796	9,204	3.4	4.6
Franchisee-owned	6,453	6,518	6,916	1.0	6.1
Total sales of products and services: (\$000)	10,292,508	10,911,314	12,363,139	6.0	13.3
Company-owned	6,306,904	6,685,410	7,731,205	6.0	15.6
Franchisee-owned	3,985,604	4,225,904	4,631,934	6.0	9.6
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	60	60	65	0.0	8.3
Supplies (such as paper goods, etc.)	50	55	60	10.0	9.1
Food ingredients	182,044	200,119	219,991	9.9	9.9
Other	3,200	3,400	3,600	6.3	5.9
Total	185,354	203,634	223,716	9.9	9.9

^{1/} Data estimated by respondents.

TABLE 53

CONVENIENCE STORES
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	24	14,960	100.0	10,292,508	100.0
1001 and Greater	4	11,558	77.3	8,756,806	85.1
501 - 1000	7	2,912	19.5	1,276,145	12.4
151 - 500					
51 - 150	5	359	2.4	192,613	1.9
11 - 50	5	112	0.7	56,834	0.5
0 - 10	3	19	0.1	10,110	0.1

CONVENIENCE STORES 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	179	131	48	Kentucky	313	73	240	North Dakota	14	0	14
Alaska	0	0	0	Louisiana	277	230	47	Ohio	724	349	375
Arizona	640	496	144	Maine	9	0	9	Oklahoma	193	191	2
Arkansas	125	29	96	Maryland	302	144	158	Oregon	217	59	158
California	2,340	698	1,642	Massachusetts	246	66	180	Pennsylvania	446	12	434
Colorado	374	357	17	Michigan	200	80	120	Rhode Island	65	38	27
Connecticut	141	51	90	Minnesota	130	85	45	South Carolina	54	54	0
Delaware	38	38	0	Mississippi	150	65	85	South Dakota	2	0	2
District of Columbia	32	4	28	Missouri	246	184	62	Tennessee	223	179	44
Florida	821	759	62	Montana	40	40	0	Texas	2,311	2,275	36
Georgia	104	96	8	Nebraska	14	0	14	Utah	187	182	5
Hawaii	31	31	0	Nevada	186	67	119	Vermont	0	0	0
Idaho	87	61	26	New Hampshire	20	0	20	Virginia	681	632	49
Illinois	584	85	499	New Jersey	233	39	194	Washington	355	54	301
Indiana	103	11	92	New Mexico	131	125	6	West Virginia	38	16	22
Iowa	56	46	10	New York	435	28	407	Wisconsin	105	8	97
Kansas	33	25	8	North Carolina	141	87	54	Wyoming	1	0	1
TOTAL									14,377	8,280	6,097

1/ Represents 96 percent of total establishments. The remaining 4 percent were unable to provide a geographic breakdown for this report.

TABLE 55

EDUCATIONAL PRODUCTS AND SERVICES ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	7,286	7,969	8,929	9.4	12.0
Company-owned	701	723	781	3.1	8.0
Franchisee-owned	6,585	7,246	8,148	10.0	12.4
Total sales of products and services: (\$000)	684,419	742,751	838,827	8.5	12.9
Company-owned	153,833	163,556	179,737	6.3	9.9
Franchisee-owned	530,586	579,195	659,090	9.2	13.8
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	1,148	1,445	2,021	25.9	39.9
Supplies (such as paper goods, etc.)	2,669	3,180	3,770	19.1	18.6
Food ingredients	37,400	43,750	49,150	17.0	12.3
Other	258	325	588	26.0	80.9
Total	41,475	48,700	55,529	17.4	14.0

^{1/} Also includes Day-Care Centers and Health and Diet Services.

^{2/} Data estimated by respondents.

TABLE 56

EDUCATIONAL PRODUCTS AND SERVICES ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	71	7,286	100.0	684,419	100.0
1001 and Greater	3	4,657	63.9	269,880	39.4
501 - 1000					
151 - 500					
51 - 150					
11 - 50	26	616	8.5	81,681	11.9
0 - 10	27	129	1.8	21,600	3.2

^{1/} Also includes Day-Care Centers and Health and Diet Services.

TABLE 57

EDUCATIONAL PRODUCTS AND SERVICES 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	17	0	17	Kentucky	12	0	12	North Dakota	5	1	4
Alaska	15	0	15	Louisiana	12	0	12	Ohio	119	22	97
Arizona	76	17	59	Maine	11	0	11	Oklahoma	31	8	23
Arkansas	9	2	7	Maryland	43	6	37	Oregon	54	28	26
California	309	85	224	Massachusetts	94	18	76	Pennsylvania	140	30	110
Colorado	95	15	80	Michigan	55	32	23	Rhode Island	12	0	12
Connecticut	18	3	15	Minnesota	46	12	34	South Carolina	12	0	12
Delaware	6	2	4	Mississippi	17	4	13	South Dakota	7	0	7
District of Columbia	13	4	9	Missouri	27	10	17	Tennessee	41	17	24
Florida	99	22	77	Montana	12	1	11	Texas	105	17	88
Georgia	117	8	109	Nebraska	23	4	19	Utah	14	2	12
Hawaii	7	0	7	Nevada	13	0	13	Vermont	7	0	7
Idaho	15	1	14	New Hampshire	10	0	10	Virginia	38	13	25
Illinois	85	26	59	New Jersey	128	55	73	Washington	87	23	64
Indiana	39	1	38	New Mexico	20	4	16	West Virginia	11	0	11
Iowa	17	3	14	New York	163	38	125	Wisconsin	61	2	59
Kansas	15	0	15	North Carolina	24	7	17	Wyoming	9	0	9
TOTAL									2,415	543	1,872

1/ Represents 33 percent of total establishments. The remaining 67 percent were unable to provide a geographic breakdown for this report.

TABLE 58

RESTAURANTS (ALL TYPES) ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	70,495	75,874	82,923	7.6	9.3
Company-owned	22,951	24,580	26,664	7.1	8.5
Franchisee-owned	47,544	51,294	56,259	7.9	9.7
Total sales of products and services: (\$000)	43,433,782	48,008,573	53,809,508	10.5	12.1
Company-owned	16,393,552	18,204,720	20,318,289	11.0	11.6
Franchisee-owned	27,040,230	29,803,853	33,491,219	10.2	12.4
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	108,076	112,690	122,819	4.3	9.0
Supplies (such as paper goods, etc.)	190,276	204,606	219,259	7.5	7.2
Food ingredients	986,997	1,121,464	1,237,197	13.6	10.3
Other	48,680	51,022	59,546	4.8	16.7
Total	1,334,029	1,489,782	1,638,821	11.7	10.0

^{1/} See Tables 60 and 61.^{2/} Data estimated by respondents.

TABLE 58

RESTAURANTS (ALL TYPES) ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	465	70,495	100.0	43,433,782	100.0
1001 and Greater	13	37,467	53.2	26,177,505	60.2
501 - 1000	16	10,578	15.0	5,024,468	11.6
151 - 500	41	11,091	15.7	6,350,901	14.6
51 - 150	69	5,809	8.2	2,869,499	6.6
11 - 50	188	4,779	6.8	2,634,095	6.1
0 - 10	138	771	1.1	377,314	0.9

^{1/} See Tables 60 and 61.

TABLE 60
RESTAURANTS: 1984-1986 1/
DISTRIBUTION BY MAJOR ACTIVITY

MAJOR ACTIVITY	Establishments			
	1984	1985	1986	
	Firms	Total	Company- Owned	Franchisee- Owned
TOTAL	465	70,495	22,951	47,544
			75,874	51,294
			82,923	26,664
				56,259
Chicken	33	8,576	3,162	5,414
			9,256	5,864
Hamburgers, Franks, Roast Beef, etc.	105	29,305	6,445	22,860
			31,016	24,079
Pizza	104	12,705	4,362	8,343
			14,417	9,541
Mexican (Taco, etc.)	36	3,774	1,702	2,072
			4,200	2,338
Seafood	12	2,320	1,308	1,012
			2,463	1,401
Pancakes, Waffles	13	1,704	526	1,178
			1,773	1,230
Steak, Full Menu	111	9,563	4,883	4,680
			9,877	4,888
Sandwich and Other	51	2,548	563	1,985
			2,872	2,292
			3,379	645
				2,734

TABLE 61
RESTAURANTS: 1984-1986 1/
DISTRIBUTION BY MAJOR ACTIVITY

MAJOR ACTIVITY	Sales (\$000)			
	1984	1985	1986	
	Firms	Total	Company- Owned	Franchisee- Owned
TOTAL	465	43,433,782	16,393,552	27,040,230
			48,008,573	29,803,853
			53,809,508	20,318,289
				33,491,219
Chicken	33	3,891,165	1,599,723	2,291,442
			4,402,558	2,553,919
Hamburgers, Franks, Roast Beef, etc.	105	22,043,955	6,055,926	15,988,029
			24,058,881	17,374,465
Pizza	104	4,932,329	1,874,951	3,057,378
			5,721,265	3,530,771
Mexican (Taco, etc.)	36	2,113,104	1,121,070	992,034
			2,403,653	1,130,501
Seafood	12	1,074,426	622,258	452,168
			1,202,950	497,800
Pancakes, Waffles	13	985,350	318,193	667,157
			1,065,430	729,835
Steak, Full Menu	111	7,767,393	4,671,807	3,095,586
			8,413,997	3,402,846
Sandwich and Other	51	626,060	129,624	496,436
			739,839	583,716
			896,420	183,115
				713,305

1/ Estimated by respondents for 1985 and 1986.

TABLE 62 RESTAURANTS (ALL TYPES) ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	1,178	332	846	Kentucky	1,302	345	957	North Dakota	148	10	138
Alaska	92	4	88	Louisiana	1,174	406	768	Ohio	3,814	1,344	2,470
Arizona	1,026	368	658	Maine	161	36	125	Oklahoma	1,387	597	790
Arkansas	682	120	562	Maryland	889	367	522	Oregon	855	223	632
California	7,146	2,325	4,821	Massachusetts	793	260	533	Pennsylvania	2,281	820	1,461
Colorado	1,181	361	820	Michigan	2,648	866	1,782	Rhode Island	119	31	88
Connecticut	546	168	378	Minnesota	1,333	366	967	South Carolina	964	273	691
Delaware	140	55	85	Mississippi	799	95	704	South Dakota	208	23	185
District of Columbia	141	73	68	Missouri	1,606	554	1,052	Tennessee	1,551	544	1,007
Florida	3,742	1,406	2,336	Montana	207	6	201	Texas	5,854	2,322	3,532
Georgia	2,121	955	1,166	Nebraska	533	124	409	Utah	397	88	309
Hawaii	220	72	148	Nevada	308	149	159	Vermont	57	4	53
Idaho	226	26	200	New Hampshire	139	26	113	Virginia	1,565	556	1,009
Illinois	3,057	1,040	2,017	New Jersey	1,110	287	823	Washington	1,033	353	680
Indiana	2,106	629	1,477	New Mexico	546	131	415	West Virginia	489	163	326
Iowa	1,108	193	913	New York	2,231	571	1,660	Wisconsin	1,332	377	955
Kansas	1,028	266	760	North Carolina	1,864	398	1,466	Wyoming	180	20	160
								TOTAL	65,633	21,138	44,505

^{1/} Represents 93 percent of total establishments. The remaining 7 percent were unable to provide a geographic breakdown for this report.

TABLE 63

INTERNATIONAL RESTAURANT FRANCHISING IN 1984
LOCATION AND NUMBER OF ESTABLISHMENTS*

	Firms	Total	Canada	Mexico	Caribbean	Europe		Asia			South America	Africa	New Zealand	Central America
						United Kingdom	Other	Australia	Japan	Other				
Chicken	9	1,757	7	68	120	375	53	235	504	157	15	164	45	14
Hamburgers, Franks and Roast Beef	16	3,117	1,333	0	100	196	428	205	667	183	47	0	19	39
Pizza	14	539	100	31	48	3	33	134	63	74	0	8	24	21
Mexican	7	90	64	0	20	0	0	2	0	2	1	0	0	1
Seafood	3	11	6	0	0	0	0	0	0	5	0	0	0	0
Pancakes, Waffles	2	12	3	0	0	0	0	0	8	1	0	0	0	0
Steak, Full Menu	14	461	175	20	2	2	0	5	248	9	0	0	0	0
Sandwich, Other	2	3	3	0	0	0	0	0	0	0	0	0	0	0
Total	67	5,990	1,591	119	290	576	514	581	1,490	431	63	172	88	75

* Includes company-owned, franchisee-owned and joint ventures.

TABLE 64

GASOLINE SERVICE STATIONS ^{1/}

Item	1984	1985	1986	Percent Changes	
				1984-85	1985-86
Total number of establishments:	132,080	124,600	121,000	-5.7	-2.9
Company-owned	23,774	22,428	21,780	-5.7	-2.9
Franchisee-owned	108,306	102,172	99,220	-5.7	-2.9
Total sales of products and services: (\$000)	100,997,000	100,492,000	102,502,000	-0.5	2.0
Company-owned	18,179,000	18,089,000	18,450,000	-0.5	2.0
Franchisee-owned	82,818,000	82,403,000	84,052,000	-0.5	2.0
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	N.A.	N.A.	N.A.		
Supplies (such as paper goods, etc.)	N.A.	N.A.	N.A.		
Food ingredients	N.A.	N.A.	N.A.		
Other	N.A.	N.A.	N.A.		
Total	N.A.	N.A.	N.A.		

^{1/} Estimated by ITA on Bureau of the Census data.

N.A. - Not Available.

GASOLINE SERVICE STATIONS
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total					
1001 and Greater					
501 - 1000					
151 - 500					
51 - 150					
11 - 50					
0 - 10					

INFORMATION NOT AVAILABLE

TABLE 65

HOTELS, MOTELS AND CAMPGROUNDS

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	6,984	7,639	8,393	9.4	9.9
Company-owned	1,025	1,081	1,187	5.5	9.8
Franchisee-owned	5,959	6,558	7,206	10.1	9.9
Total sales of products and services: (\$000)	13,159,020	14,261,153	15,511,833	8.4	8.8
Company-owned	4,061,835	4,361,525	4,675,609	7.4	7.2
Franchisee-owned	9,097,185	9,899,628	10,836,224	8.8	9.5
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	3,386	5,498	6,516	62.4	18.5
Supplies (such as paper goods, etc.)	10,415	12,887	14,458	23.7	12.2
Food ingredients	240	240	240	0.0	0.0
Other	0	0	0	0.0	0.0
Total	14,041	18,625	21,214	32.6	13.9

^{1/} Estimated by respondents.

TABLE 66

HOTELS, MOTELS AND CAMPGROUNDS
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	42	6,984	100.0	13,159,020	100.0
1001 and Greater	5	3,811	54.6	6,962,882	52.9
501 - 1000					
151 - 500	6	1,899	27.2	3,580,918	27.2
51 - 150	9	869	12.4	2,288,539	17.4
11 - 50	14	371	5.3	300,134	2.3
0 - 10	8	34	0.5	26,547	0.2

TABLE 67 HOTELS, MOTELS AND CAMPGROUNDS ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	112	14	98	Kentucky	123	18	105	North Dakota	28	3	25
Alaska	5	1	4	Louisiana	142	19	123	Ohio	235	36	199
Arizona	130	26	104	Maine	30	4	26	Oklahoma	93	11	82
Arkansas	86	9	77	Maryland	92	12	80	Oregon	41	6	35
California	457	83	374	Massachusetts	117	21	96	Pennsylvania	202	15	187
Colorado	146	13	133	Michigan	140	19	121	Rhode Island	12	1	11
Connecticut	60	12	48	Minnesota	108	28	80	South Carolina	136	20	118
Delaware	15	2	13	Mississippi	85	5	80	South Dakota	54	6	48
District of Columbia	22	7	15	Missouri	127	16	111	Tennessee	215	43	172
Florida	565	72	493	Montana	50	11	39	Texas	510	98	412
Georgia	254	21	233	Nebraska	40	5	35	Utah	58	6	52
Hawaii	9	7	2	Nevada	33	11	22	Vermont	23	1	22
Idaho	27	3	24	New Hampshire	27	5	22	Virginia	280	33	247
Illinois	201	37	164	New Jersey	111	18	93	Washington	72	12	60
Indiana	164	24	140	New Mexico	70	8	62	West Virginia	41	2	39
Iowa	56	9	47	New York	222	29	193	Wisconsin	94	20	74
Kansas	61	8	53	North Carolina	232	24	208	Wyoming	46	2	44
								TOTAL	6,261	916	5,345

^{1/} Represents 90 percent of total establishments. The remaining 10 percent were unable to provide a geographic breakdown for this report.

TABLE 68

LAUNDRY AND DRYCLEANING SERVICES

Item	1984	1985 ^{1/}	1986 ^{1/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	2,801	2,711	2,781	-3.2	2.6
Company-owned	163	156	168	-4.3	7.7
Franchisee-owned	2,638	2,555	2,613	-3.1	2.3
Total sales of products and services: (\$000)	286,062	297,650	331,130	4.1	11.2
Company-owned	36,022	38,040	43,120	5.6	13.4
Franchisee-owned	250,040	259,610	288,010	3.8	10.9
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	0	0	0	0.0	0.0
Supplies (such as paper goods, etc.)	21	21	22	0.0	4.8
Food ingredients	0	0	0	0.0	0.0
Other	4,650	5,075	5,500	9.1	8.4
Total	4,671	5,096	5,522	9.1	8.4

^{1/} Data estimated by respondents.

TABLE 69

LAUNDRY AND DRYCLEANING SERVICES
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	17	2,801	100.0	286,062	100.0
1001 and Greater	5	2,463	87.9	207,775	72.6
501 - 1000					
151 - 500					
51 - 150	3	183	6.6	61,640	21.6
11 - 50	5	129	4.6	13,707	4.8
0 - 10	4	26	0.9	2,940	1.0

TABLE 70

LAUNDRY AND DRYCLEANING SERVICES ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	18	0	18	Kentucky	29	0	29	North Dakota	9	0	9
Alaska	5	0	5	Louisiana	66	0	66	Ohio	54	26	28
Arizona	18	1	17	Maine	1	0	1	Oklahoma	9	0	9
Arkansas	4	0	4	Maryland	15	0	15	Oregon	34	2	32
California	220	5	215	Massachusetts	4	0	4	Pennsylvania	25	0	25
Colorado	13	0	13	Michigan	93	0	93	Rhode Island	1	0	1
Connecticut	1	0	1	Minnesota	89	0	89	South Carolina	61	0	61
Delaware	0	0	0	Mississippi	22	0	22	South Dakota	5	0	5
District of Columbia	2	0	2	Missouri	21	0	21	Tennessee	22	1	21
Florida	346	46	300	Montana	2	0	2	Texas	246	22	224
Georgia	98	3	95	Nebraska	25	0	25	Utah	8	0	8
Hawaii	1	0	1	Nevada	6	0	6	Vermont	3	0	3
Idaho	10	0	10	New Hampshire	4	0	4	Virginia	29	2	27
Illinois	37	1	36	New Jersey	24	0	24	Washington	57	0	57
Indiana	12	0	12	New Mexico	7	0	7	West Virginia	5	0	5
Iowa	17	3	14	New York	258	0	258	Wisconsin	63	0	63
Kansas	29	0	29	North Carolina	29	5	24	Wyoming	3	0	3
								TOTAL	2,160	117	2,043

^{1/} Represents 75 percent of total establishments. The remaining 25 percent were unable to provide a geographic breakdown for this report.

TABLE 71

RECREATION, ENTERTAINMENT AND TRAVEL ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	7,197	7,743	8,374	7.6	8.1
Company-owned	381	432	496	13.4	14.8
Franchisee-owned	6,816	7,311	7,878	7.3	7.8
Total sales of products and services: (\$000)	1,809,935	2,172,280	2,735,525	20.0	25.9
Company-owned	672,363	738,760	885,250	9.9	19.8
Franchisee-owned	1,137,572	1,433,520	1,850,275	26.0	29.1
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	2,404	2,505	2,702	4.2	7.9
Supplies (such as paper goods, etc.)	474	625	780	31.9	24.8
Food ingredients	0	0	0	0.0	0.0
Other	975	1,000	1,000	2.6	0.0
Total	3,853	4,130	4,482	7.2	8.5

^{1/} Includes Travel Agencies, Miniature Golf Courses, and Dance Studios.^{2/} Data estimated by respondents.

TABLE 72

RECREATION, ENTERTAINMENT AND TRAVEL ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	39	7,197	100.0	1,809,935	100.0
1001 and Greater	9	6,022	83.7	1,233,730	68.2
501 - 1000					
151 - 500					
51 - 150	9	804	11.2	441,654	24.4
11 - 50	10	305	4.2	117,930	6.5
0 - 10	11	66	0.9	16,621	0.9

^{1/} Includes Travel Agencies, Miniature Golf Courses, and Dance Studios.

TABLE 73

RECREATION, ENTERTAINMENT AND TRAVEL ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	42	2	40	Kentucky	23	0	23	North Dakota	9	0	9
Alaska	3	0	3	Louisiana	37	4	33	Ohio	165	9	156
Arizona	45	15	30	Maine	9	0	9	Oklahoma	80	1	79
Arkansas	14	0	14	Maryland	30	3	27	Oregon	22	2	20
California	412	131	281	Massachusetts	51	4	47	Pennsylvania	125	13	112
Colorado	82	11	71	Michigan	61	7	54	Rhode Island	8	0	8
Connecticut	38	3	35	Minnesota	48	5	43	South Carolina	47	2	45
Delaware	10	0	10	Mississippi	20	0	20	South Dakota	14	0	14
District of Columbia	9	8	1	Missouri	115	14	101	Tennessee	60	3	57
Florida	212	19	193	Montana	20	0	20	Texas	285	24	261
Georgia	85	10	75	Nebraska	34	0	34	Utah	7	0	7
Hawaii	9	1	8	Nevada	15	5	10	Vermont	12	0	12
Idaho	12	0	12	New Hampshire	11	0	11	Virginia	82	4	78
Illinois	108	20	88	New Jersey	86	4	82	Washington	30	4	26
Indiana	69	0	69	New Mexico	23	1	22	West Virginia	11	0	11
Iowa	30	0	30	New York	186	31	155	Wisconsin	43	14	29
Kansas	57	1	56	North Carolina	74	3	71	Wyoming	9	0	9
								TOTAL	3,089	378	2,711

^{1/} Represents 43 percent of total establishments. The remaining 57 percent were unable to provide a geographic breakdown for this report.

TABLE 74

RENTAL SERVICES (AUTO-TRUCK) ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	11,253	11,764	12,461	4.5	5.9
Company-owned	2,333	2,385	2,444	2.2	2.5
Franchisee-owned	8,920	9,379	10,017	5.1	6.8
Total sales of products and services: (\$000)	4,966,400	5,450,875	6,207,950	9.8	13.9
Company-owned	2,897,076	3,182,490	3,621,850	9.9	13.8
Franchisee-owned	2,069,324	2,268,385	2,586,100	9.6	14.0
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	0	0	0	0.0	0.0
Supplies (such as paper goods, etc.)	2,634	2,695	3,213	2.3	19.2
Food ingredients	0	0	0	0.0	0.0
Other	0	0	0	0.0	0.0
Total	2,634	2,695	3,213	2.3	19.2

^{1/} Includes Leasing.^{2/} Data estimated by respondents.

TABLE 75

RENTAL SERVICES (AUTO-TRUCK) ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	28	11,253	100.0	4,966,400	100.0
1001 and Greater	5	8,006	71.1	4,154,050	83.6
501 - 1000	8	2,669	23.7	560,820	11.3
151 - 500					
51 - 150	4	390	3.5	153,700	3.1
11 - 50	6	168	1.5	91,900	1.9
0 - 10	5	20	0.2	5,930	0.1

^{1/} Includes Leasing.

TABLE 76

RENTAL SERVICES (AUTO-TRUCK) 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	84	9	75	Kentucky	72	11	61	North Dakota	26	1	25
Alaska	67	2	65	Louisiana	95	20	75	Ohio	262	56	206
Arizona	120	36	84	Maine	44	14	30	Oklahoma	76	14	62
Arkansas	39	0	39	Maryland	135	30	105	Oregon	81	16	65
California	732	261	471	Massachusetts	239	48	191	Pennsylvania	418	63	353
Colorado	146	33	113	Michigan	218	37	181	Rhode Island	41	14	27
Connecticut	129	32	97	Minnesota	116	15	101	South Carolina	90	23	67
Delaware	30	2	28	Mississippi	69	4	65	South Dakota	43	7	36
District of Columbia	27	9	18	Missouri	75	8	67	Tennessee	94	15	79
Florida	399	182	217	Montana	77	0	77	Texas	442	84	358
Georgia	130	35	95	Nebraska	41	8	33	Utah	60	3	57
Hawaii	86	52	34	Nevada	48	23	25	Vermont	31	5	26
Idaho	52	4	48	New Hampshire	49	9	40	Virginia	180	47	133
Illinois	320	70	250	New Jersey	371	40	331	Washington	172	42	130
Indiana	139	15	124	New Mexico	69	9	60	West Virginia	67	5	62
Iowa	76	5	71	New York	594	104	490	Wisconsin	172	20	152
Kansas	64	16	48	North Carolina	226	22	204	Wyoming	49	0	49
								TOTAL	7,482	1,582	5,900

1/ Represents 66 percent of total establishments. The remaining 34 percent were unable to provide a geographic breakdown for this report.

TABLE 77

RENTAL SERVICES (EQUIPMENT) ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	2,324	2,555	2,936	9.9	14.9
Company-owned	461	*506	582	9.8	15.0
Franchisee-owned	1,863	2,049	2,354	10.0	14.9
Total sales of products and services: (\$000)	639,206	706,712	807,393	10.6	14.2
Company-owned	212,957	240,692	271,583	13.0	12.8
Franchisee-owned	426,249	466,020	535,810	9.3	15.0
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	33,130	34,360	36,860	3.7	7.3
Supplies (such as paper goods, etc.)	1,000	1,072	1,177	7.2	9.8
Food ingredients	0	0	0	0.0	0.0
Other	10,742	11,823	12,879	10.1	8.9
Total	44,872	47,255	50,916	5.3	7.7

^{1/} Includes Formal Wear.^{2/} Data estimated by respondents.

TABLE 78

RENTAL SERVICES (EQUIPMENT) ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	28	2,324	100.0	639,206	100.0
1001 and Greater	0	0	0.0	0	0.0
501 - 1000	0	0	0.0	0	0.0
151 - 500	5	1,498	64.5	372,150	58.2
51 - 150	6	489	21.0	189,824	29.7
11 - 50	11	308	13.3	71,842	11.3
0 - 10	6	29	1.2	5,390	0.8

^{1/} Includes Formal Wear.

TABLE 79

RENTAL SERVICES (EQUIPMENT) ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	41	1	40	Kentucky	30	2	28	North Dakota	3	0	3
Alaska	2	1	1	Louisiana	32	3	29	Ohio	82	9	73
Arizona	42	5	37	Maine	16	0	16	Oklahoma	33	4	29
Arkansas	21	0	21	Maryland	25	2	23	Oregon	20	1	19
California	220	67	153	Massachusetts	112	12	100	Pennsylvania	52	3	49
Colorado	39	12	27	Michigan	40	2	38	Rhode Island	13	1	12
Connecticut	38	0	38	Minnesota	63	6	57	South Carolina	30	0	30
Delaware	5	1	4	Mississippi	30	1	29	South Dakota	3	0	3
District of Columbia	0	0	0	Missouri	32	5	27	Tennessee	32	3	29
Florida	132	22	110	Montana	10	0	10	Texas	198	31	167
Georgia	44	8	36	Nebraska	17	1	16	Utah	37	1	36
Hawaii	9	0	9	Nevada	14	3	11	Vermont	5	0	5
Idaho	13	0	13	New Hampshire	15	0	15	Virginia	34	1	33
Illinois	81	29	52	New Jersey	30	2	28	Washington	28	1	27
Indiana	47	7	40	New Mexico	10	0	10	West Virginia	8	0	8
Iowa	35	9	26	New York	33	0	33	Wisconsin	47	2	45
Kansas	23	1	22	North Carolina	34	2	32	Wyoming	2	0	2
								TOTAL	1,962	261	1,701

^{1/} Represents 84 percent of total establishments. The remaining 16 percent were unable to provide a geographic breakdown for this report.

TABLE 80

RETAILING (NON-FOOD) ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	39,970	42,269	45,263	5.6	7.1
Company-owned	12,249	12,330	12,170	0.7	- 1.3
Franchisee-owned	27,721	29,939	33,093	8.0	10.5
Total sales of products and services: (\$000)	15,527,699	17,221,196	19,456,827	10.9	13.0
Company-owned	5,200,109	5,745,201	6,362,053	10.5	10.7
Franchisee-owned	10,327,590	11,475,995	13,094,774	11.1	14.1
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	2,275,877	2,563,503	2,908,643	12.6	13.5
Supplies (such as paper goods, etc.)	30,721	33,942	45,189	10.5	33.1
Food ingredients	0	0	0	0.0	0.0
Other	912	3,125	6,960	242.7	122.7
Total	2,307,510	2,600,570	2,960,792	12.7	13.9

^{1/} Includes General Merchandise, Drugs and Cosmetics, Gift Shops, Shoes and Apparel, Hardware, Paints and Floor Covering, Furniture, Draperies and Bedding, Consumer Electronics, and Vending.

^{2/} Data estimated by respondents.

TABLE 81

RETAILING (NON-FOOD) ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	291	39,970	100.0	15,527,699	100.0
1001 and Greater	9	19,630	49.1	6,315,125	40.7
501 - 1000	9	5,588	14.0	2,991,518	19.3
151 - 500	29	7,239	18.1	2,668,054	17.2
51 - 150	57	4,711	11.8	1,495,627	9.6
11 - 50	95	2,328	5.8	1,887,096	12.1
0 - 10	92	474	1.2	170,279	1.1

^{1/} Includes General Merchandise, Drugs and Cosmetics, Gift Shops, Shoes and Apparel, Hardware, Paints and Floor Covering, Furniture, Draperies and Bedding, Consumer Electronics, and Vending.

TABLE 82

RETAILING (NON-FOOD) ^{1/}
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	333	132	201	Kentucky	506	156	350	North Dakota	299	18	281
Alaska	89	8	81	Louisiana	791	443	348	Ohio	1,203	584	619
Arizona	480	202	278	Maine	174	50	124	Oklahoma	556	143	413
Arkansas	365	68	297	Maryland	460	239	221	Oregon	471	123	348
California	3,299	1,544	1,755	Massachusetts	614	331	283	Pennsylvania	1,070	491	579
Colorado	716	179	537	Michigan	933	374	559	Rhode Island	102	44	58
Connecticut	328	150	178	Minnesota	2,040	216	1,824	South Carolina	356	131	225
Delaware	76	39	37	Mississippi	305	100	205	South Dakota	332	21	311
District of Columbia	46	21	25	Missouri	829	247	582	Tennessee	740	245	495
Florida	1,775	509	1,266	Montana	308	20	288	Texas	2,170	832	1,338
Georgia	724	315	409	Nebraska	500	75	425	Utah	247	77	170
Hawaii	66	10	56	Nevada	147	46	101	Vermont	86	15	71
Idaho	213	24	189	New Hampshire	159	44	115	Virginia	723	313	410
Illinois	1,455	487	968	New Jersey	625	262	363	Washington	628	218	410
Indiana	732	288	444	New Mexico	203	50	153	West Virginia	248	112	136
Iowa	1,006	94	912	New York	1,300	651	649	Wisconsin	1,038	203	835
Kansas	542	101	441	North Carolina	659	291	368	Wyoming	234	15	219
								TOTAL	33,301	11,351	21,950

^{1/} Represents 83 percent of total establishments. The remaining 17 percent were unable to provide a geographic breakdown for this report.

TABLE 83

RETAILING (FOOD OTHER THAN CONVENIENCE STORES) ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	16,202	17,617	20,153	8.7	14.4
Company-owned	2,418	2,506	2,741	3.6	9.4
Franchisee-owned	13,784	15,111	17,412	9.6	15.2
Total sales of products and services: (\$000)	8,630,991	9,069,933	9,916,083	5.1	9.3
Company-owned	2,159,503	2,237,644	2,537,596	3.6	13.4
Franchisee-owned	6,471,488	6,832,289	7,378,487	5.6	8.0
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	48,545	43,063	49,367	-11.3	14.6
Supplies (such as paper goods, etc.)	22,697	23,269	24,591	2.5	5.7
Food ingredients	592,302	610,627	673,505	3.1	10.3
Other	15,415	13,292	17,394	-13.8	30.9
Total	678,959	690,251	764,857	1.7	10.8

^{1/} Includes Retail Specialty Food Shops, Donut Shops, Ice Cream Stores, Coffee Services, Candy Stores, Bakeries and Supermarkets.

^{2/} Data estimated by respondents.

TABLE 84

RETAILING (FOOD OTHER THAN CONVENIENCE STORES) ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	166	16,202	100.0	8,630,991	100.0
1001 and Greater	}				
501 - 1000		8,266	51.0	5,285,068	61.2
151 - 500		4,214	26.0	1,333,751	15.5
51 - 150	21	1,758	10.9	1,431,553	16.6
11 - 50	66	1,656	10.2	511,635	5.9
0 - 10	55	308	1.9	68,984	0.8

^{1/} Includes Retail Specialty Food Shops, Donut Shops, Ice Cream Stores, Coffee Services, Candy Stores, Bakeries and Supermarkets.

TABLE 85

RETAILING (FOOD OTHER THAN CONVENIENCE STORES) 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	223	8	215	Kentucky	193	26	167	North Dakota	75	9	66
Alaska	18	1	17	Louisiana	360	19	241	Ohio	517	111	406
Arizona	213	49	164	Maine	34	4	30	Oklahoma	132	8	124
Arkansas	147	33	114	Maryland	225	19	206	Oregon	132	3	129
California	1,610	354	1,256	Massachusetts	407	86	321	Pennsylvania	779	139	640
Colorado	199	29	170	Michigan	435	90	345	Rhode Island	73	16	57
Connecticut	310	58	252	Minnesota	339	85	254	South Carolina	216	6	210
Delaware	57	6	51	Mississippi	141	3	138	South Dakota	88	5	83
District of Columbia	28	5	23	Missouri	188	39	149	Tennessee	201	26	175
Florida	872	101	771	Montana	23	1	22	Texas	671	122	749
Georgia	426	27	399	Nebraska	67	13	54	Utah	72	8	64
Hawaii	60	12	48	Nevada	41	5	36	Vermont	33	6	27
Idaho	27	5	22	New Hampshire	52	9	43	Virginia	255	25	230
Illinois	1,066	143	923	New Jersey	579	60	519	Washington	175	20	155
Indiana	258	30	228	New Mexico	102	0	102	West Virginia	62	2	60
Iowa	159	24	135	New York	1,367	214	1,153	Wisconsin	333	47	286
Kansas	86	6	80	North Carolina	233	43	190	Wyoming	12	1	11
								TOTAL	14,471	2,161	12,310

1/ Represents 89 percent of total establishments. The remaining 11 percent were unable to provide a geographic breakdown for this report.

TABLE 86

SOFT DRINK BOTTLERS ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	1,518	1,391	1,300	- 8.4	-6.5
Company-owned	95	105	115	10.5	9.5
Franchisee-owned	1,423	1,286	1,185	- 9.6	-7.9
Total sales of products and services: (\$000)	16,700,000	18,100,000	19,500,000	8.4	7.7
Company-owned	1,336,000	1,448,000	1,560,000	8.4	7.7
Franchisee-owned	15,364,000	16,652,000	17,940,000	8.4	7.7
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	N.A.	N.A.	N.A.		
Supplies (such as paper goods, etc.)	N.A.	N.A.	N.A.		
Food ingredients	N.A.	N.A.	N.A.		
Other	N.A.	N.A.	N.A.		
Total	N.A.	N.A.	N.A.		

^{1/} Includes Soft Drink and Aides; Syrups, Flavoring Agents and Bases. Data does not include figures for independent private label and contract-filler bottling companies which account for 22 percent in 1984, 22 percent in 1985 and 22 percent in 1986.

^{2/} Estimated by ITA based on Bureau of the Census and trade association data.

TABLE

SOFT DRINK BOTTLERS
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total					
1001 and Greater					
501 - 1000					
151 - 500					
51 - 150					
11 - 50					
0 - 10					

INFORMATION NOT AVAILABLE

TABLE 87

MISCELLANEOUS ^{1/}

Item	1984	1985 ^{2/}	1986 ^{2/}	Percent Changes	
				1984-85	1985-86
Total number of establishments:	4,837	5,482	6,657	13.3	21.4
Company-owned	514	361	437	-29.8	21.1
Franchisee-owned	4,323	5,121	6,220	18.5	21.5
Total sales of products and services: (\$000)	798,281	910,267	1,118,459	14.0	22.9
Company-owned	126,421	108,187	126,726	-14.4	17.1
Franchisee-owned	671,860	802,080	991,733	19.4	23.6
Total sales of products and services by Franchisors to Franchisees: (\$000)					
Merchandise (non-food) for resale	30,656	34,632	41,710	13.0	20.4
Supplies (such as paper goods, etc.)	2,862	3,631	4,890	26.9	34.7
Food ingredients	0	0	0	0.0	0.0
Other	3,214	4,542	6,212	41.3	36.8
Total	36,732	42,805	52,812	16.5	23.4

^{1/} Includes Beauty Salons, Fitness Centers, Wholesale Services and Others.^{2/} Data estimated by respondents.

TABLE 88

MISCELLANEOUS ^{1/}
DISTRIBUTION BY NUMBER OF ESTABLISHMENTS - 1984

Size Groups	Franchising Companies Number	Establishments		Sales	
		Number	Percent	(\$000)	Percent
Total	68	4,837	100.0	798,281	100.0
1001 and Greater	0	0	0.0	0	0.0
501 - 1000	9	3,518	72.8	578,319	72.4
151 - 500					
51 - 150					
11 - 50	25	625	12.9	121,123	15.2
0 - 10	27	132	2.7	29,732	3.7

^{1/} Includes Beauty Salons, Fitness Centers, Wholesale Services and Others.

TABLE 89

**WISCELLANEOUS 1/
NUMBER OF ESTABLISHMENTS BY STATE: 1984**

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	43	4	39	Kentucky	49	6	43	North Dakota	5	0	5
Alaska	7	0	7	Louisiana	51	10	41	Ohio	180	48	132
Arizona	91	19	72	Maine	22	0	22	Oklahoma	30	2	28
Arkansas	24	3	21	Maryland	52	2	50	Oregon	29	0	29
California	469	58	411	Massachusetts	121	13	108	Pennsylvania	159	16	143
Colorado	102	13	89	Michigan	123	2	121	Rhode Island	16	5	11
Connecticut	57	1	56	Minnesota	116	40	76	South Carolina	43	0	43
Delaware	7	0	7	Mississippi	10	0	10	South Dakota	4	0	4
District of Columbia	3	0	3	Missouri	68	9	59	Tennessee	75	18	57
Florida	208	18	190	Montana	4	0	4	Texas	233	30	203
Georgia	67	9	58	Nebraska	36	1	35	Utah	37	8	29
Hawaii	10	0	10	Nevada	19	2	17	Vermont	10	1	9
Idaho	9	0	9	New Hampshire	11	0	11	Virginia	62	0	62
Illinois	206	57	149	New Jersey	87	1	86	Washington	37	1	36
Indiana	68	19	49	New Mexico	21	1	20	West Virginia	56	4	52
Iowa	52	4	48	New York	247	26	221	Wisconsin	52	7	45
Kansas	20	0	20	North Carolina	57	8	49	Wyoming	10	0	10
TOTAL									3,575	466	3,109

1/ Represents 74 percent of total establishments. The remaining 26 percent were unable to provide a geographic breakdown for this report.

TABLE 90

ALL FRANCHISING 1/ 2/
NUMBER OF ESTABLISHMENTS BY STATE: 1984

State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned	State	Total	Company- Owned	Franchisee- Owned
Alabama	2,986	660	2,326	Kentucky	3,265	653	2,612	North Dakota	826	45	781
Alaska	444	18	426	Louisiana	3,844	1,202	2,642	Ohio	9,856	2,817	7,039
Arizona	4,057	1,322	2,735	Maine	816	112	704	Oklahoma	3,540	1,041	2,499
Arkansas	2,070	289	1,781	Maryland	3,221	927	2,294	Oregon	2,760	490	2,270
California	25,097	6,091	19,006	Massachusetts	4,180	1,001	3,179	Pennsylvania	7,849	1,748	6,101
Colorado	4,332	1,099	3,233	Michigan	7,023	1,659	5,364	Rhode Island	666	160	506
Connecticut	2,556	532	2,024	Minnesota	5,583	942	4,641	South Carolina	2,781	533	2,248
Delaware	570	161	409	Mississippi	2,141	305	1,836	South Dakota	988	66	922
District of Columbia	458	165	293	Missouri	4,604	1,165	3,439	Tennessee	4,246	1,160	3,086
Florida	12,704	3,400	9,304	Montana	998	79	919	Texas	18,040	6,214	11,826
Georgia	5,753	1,604	4,149	Nebraska	1,848	275	1,573	Utah	1,631	399	1,232
Hawaii	674	193	481	Nevada	1,155	316	839	Vermont	458	35	423
Idaho	1,003	131	872	New Hampshire	811	95	716	Virginia	5,116	1,711	3,405
Illinois	9,875	2,061	7,814	New Jersey	4,910	893	4,017	Washington	3,835	779	3,056
Indiana	5,048	1,091	3,957	New Mexico	1,637	336	1,301	West Virginia	1,345	325	1,020
Iowa	3,404	400	3,004	New York	9,633	1,883	7,750	Wisconsin	4,540	734	3,806
Kansas	2,556	463	2,093	North Carolina	4,914	938	3,976	Wyoming	749	39	710
								TOTAL	213,396	50,757	162,639

1/

Represents 75 percent of total establishments. The remaining 25 percent were unable to provide a geographic breakdown for this report.

2/

Does not include Automobile and Truck Dealers, Gasoline Service Stations and Soft Drink Bottlers for which data was not collected.